SALES INTROVERTS

ACCOUNT EXECUTIVE

FRAMEWORKS 2.0

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SALES INTROVERTS

Introduction

Why Frameworks?

My career changed with a simple compliment: “You don’t seem like a salesperson.” But here’s a confession: for the first two years of my career, I painfully seemed like a salesperson.

I tried “proven” scripts.

I copied top performers.

I memorized sales process “battle cards.”

I was doing everything “by the book” and having a miserable experience while making no money.

So I stopped.

Then, I started paying more attention to how my prospects reacted at different parts of the sales process.

Where they leaned in, and where they pushed back.

My focus became less about “how do I get to the next stage of my sales process” and more about “what does the buyer need from me to move along their decision process?”

The shift paid off. Buyers’ walls came down, trust went up, and sales calls turned into enjoyable conversations.

Right about the same time I was told, “You don’t seem like a salesperson” for the first time, my win rate began to climb, and I went from the bottom of the sales floor to the top.

After finishing as the #1 AE, I moved into a leadership role.

I taught my team my approach to selling, and our team finished number one in consecutive years. One year, we went so far over quota that we broke the report and didn’t even appear on the leaderboard!

Because of our success, our team grew into a region. I was fortunate to promote top performers into leadership roles as I went from managing one team to ten.

To support that scale, I began to document what I had been teaching for years.

These Frameworks are a result of that documentation. They’ve helped me build world-class sales organizations at Qualtrics, MongoDB, and helped thousands of sellers accelerate their careers.

I’m grateful you’ve trusted me with your development. I hope you find as much value in reviewing and applying these Frameworks as I’ve found in creating them.

How to use

The Frameworks are broken into six sections:

- Territory Planning
- Pipeline Generation
- Discovery
- Solution Presentation
- End of Deal
- Career Evaluation

For your first review, I recommend going start to finish to become familiar with the concepts and layout.

Then, to maximize the impact on your commission checks, I recommend revisiting sections when preparing for different stages of your deals. For example, a quick refresh Discovery section while prepping for a discovery call will help you prevent the mistakes that your peers and competitors will still be guilty of.

All sections include examples, some sections include exercises. You'll improve your understanding and application of the Frameworks if you take the time to complete these.

Like anything, you'll get out of Frameworks what you put into learning them. I'd be honored if these became a go-to resource that you frequently revisit - I've even had a reader call them their "sales bible."

Let's begin with how you'll spend your time where you'll make money with effective Territory Management.

SALES INTROVERTS

TERRITORY PLANNING | SECTION 2

Territory Planning

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Territory Planning

Introduction

There has been one constant in my career: an obsession with effective territory management.

As an AE, I spent hours manually scoring thousands of accounts so I could focus my time where I was most likely to win.

As a VP, I spend hours identifying signals and trends to ensure I set up all of my team for success. And yes, I still spend more time than I'd like to admit manually reviewing accounts in spreadsheets.

The objective of this first section is to teach you the foundational elements of territory management.

After review, you'll be equipped to spend more time selling to accounts where you'll win, and less time wondering, "which accounts should I work today?"

We'll begin with how to "score" the quality of an account.

Account Scoring

Considering that a sales rep's assigned territory is how they make money, it's surprising how rarely AEs understand where they should spend their time. When a new AE (or leader) joins my organization, priority number one is helping them understand how to organize, understand, and optimize their patch for sustained success.

I've reviewed accounts with hundreds of reps in my career. When scoring accounts, most reps place too much weight on revenue and employee count.

They default to, "the bigger the account, the bigger the opportunity."

If they work for a mature company, they will often put too much weight on an internally calculated "Account Score" heavily influenced by revenue and employee count.

Heavy reliance on any of these three metrics is ineffective for two reasons:

1. Data quality (especially for privately held companies) is usually garbage
2. These quantitative measures don't tell the whole story

I doubt the "data quality sucks" statement is surprising to you. I've never spoken to a salesperson that thought they had great CRM data.

The impact is painful: ops will highlight accounts for you to work based on revenue and employee count numbers that are often wrong.

However, even if you have perfect data for every company in your patch, there's more nuance in territory management than just numbers.

For example, which of these two companies would you rather prospect into:

Company A: $500 million revenue, 2,000 employees, no clear use case for your product
Company B: $50 million revenue, 500 employees, multiple clear use cases for your product

If you are like me, you chose the latter.

But are you prioritizing your current territory accordingly? Or, are you over-indexing on account size and growing frustrated as you are unable to open many conversations?

Allow me to introduce the Prioritization Framework I've used as an AE, manager, and VP at Qualtrics, and continue to use as a VP at MongoDB: Use Case and Budget.

Some quick definitions:

Use Case: You can identify where and how your product would be used.

At MongoDB, this would be as simple as, "Does this company build software?" If they build software, they use databases.

Budget: The company *likely invests*, or would invest, in solutions like yours.

I get a lot of questions on this topic: "How can I know if they have budget without talking to them?"

What I'm looking for is the *potential* that they have budget - not that they've already allocated budget.

My two favorite signals for potential budget are the use of a competitor and headcount growth in your target departments:

The use of a competitive solution

I look for competitive solutions by searching their current employee's LinkedIn profiles for competitor names as well as looking at open job descriptions.

People often list tools they use on their profile.

Companies nearly always list solutions they use on job descriptions, hoping to find applicants that already know how to use those solutions.

If they are spending on a competitor, there's potential budget for you to capture.

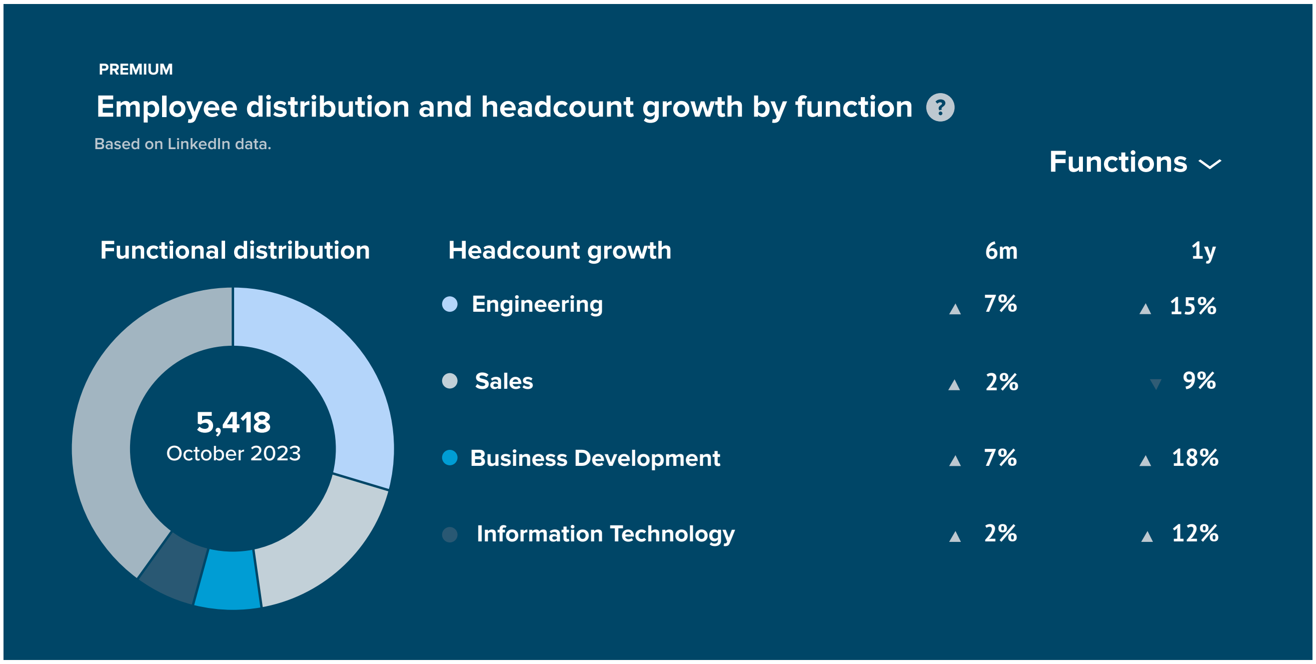
Headcount growth in target department(s)

This is a great way to validate potential budget in an account (much better than revenue). If they are investing in headcount, they'll invest in solutions to support that headcount.

I get this data in two ways:

- Open job postings (similar to the "Using your competitors" section)
- LinkedIn "Insights" tab (requires a premium subscription - example image below)

At Mongo, a company growing their engineering team is a good sign that budget for our solutions could be made available.



Now that you understand the Use Case/Budget concept, here is how I have my teams tier their accounts:

Priority 1 - Use Case and Budget
Priority 2 - Use Case or Budget
Priority 3 - No Use Case or Budget

Here's a simple, practical example of prioritization in terms of a luxury car salesman:

Priority 1 - Middle-aged professional. They can drive, and they have discretionary income.

Priority 2 (Use Case, no budget) - Teenager. They can drive but won't likely have discretionary income.

Priority 2 (Budget, no use case) - Retiree on their private island. They have money but don't need a car on their little plot of paradise (I hope this is me in 30 years...)

Priority 3 - Pre-teen. They can't drive and almost certainly don't have discretionary income.

Here's another example of prioritization for MongoDB, a B2B software-as-as-service (SAAS) company:

1 **Priority 1** - SAAS Company with 50+ engineers and hiring more. They build applications (indicator of use case), and they are investing in engineers (indicator of budget)

2 **Priority 2** (Use Case, no budget) - Small tech startup. They build applications (use case), but their data size is likely too small to invest in a premium database solution (no evidence of budget)

2 **Priority 2** (Budget, no use case): A systems integrator. They spend a lot on engineers (indicator of budget), but are building applications for their customers instead of their own applications (no use case)

3 **Priority 3**: Manufacturing company. Their model is monetizing physical goods, not software. No budget or use case.

Ideally, you can have your sales operations team add a custom field in your CRM with a picklist to assign each of your accounts one of these scores. That way, you can manage your territory fully inside your CRM.

If that's not an option, building out in Excel or Google Sheets is a suitable alternative. The goal is to have one place where you can quickly see your top priority accounts.

Once organized, plan to spend 80%+ of your time on Priority 1 accounts.

Then, plan to use more automated approaches + SDR support on Priority 2, and never look at Priority 3 accounts again.

Organizing your territory in this way is a time-consuming exercise. **Do not skip it, or try to find shortcuts.** Even the most optimized sales process will not make up for working low quality territory.

Once you have this foundation, you are ready to optimize your territory by understanding and covering your accounts.

Understanding Business Models

Now that you are focusing on the right accounts, you can optimize your approach by ensuring you have a strong understanding of their business models.

It sounds so simple, but you'd be surprised at how often an AE can't give me a good answer to these questions:

- How do they make money?
- How do they interact with their customers?
- What is the current health of the business?

A question you can ask yourself that builds on the above is, "If you had a meeting with their executive team, how comfortable are you discussing their business in their language and tying your solution to their goals?"

If you have great accounts in your territory, but you don't have a strong answer to these questions, you'll struggle finding success.

If you are like the AEs I've worked with, your Priority 1 account list will have a mix of accounts you understand well, as well as accounts that aren't as familiar to you.

I recommend to first put your focus on accounts where you have a strong business understanding. While these may have lower upside, they are better short-term bets for winning revenue.

Then, work to learn about the challenges and opportunities in those more complex accounts so you can effectively pursue them in the future. This approach optimizes short-term pipeline creation/win-rates while also building towards longer-term, bigger bets.

Over time, you should optimize and expand your territory:

You **optimize** through a deeper understanding of your initial Priority 1 accounts.

You **expand** your territory as your understanding of different industries and use cases promotes previous Priority 2 accounts where Use Case was uncertain into new Priority 1 accounts.

Customer Expansion

If your territory includes customers, a critical element of your territory management includes customer management.

Most AEs delay expansion conversations until the last months of the license.

This kills their chance at upsell, because renewal budgets are planned well in advance, and the customer isn't likely to include "buffer budget" for a big upgrade.

To maximize customer expansion, ensure you are working with your customer well in advance of their renewal date.

Part of your Priority 1 account list should be a running list of your customers that renew in the next six months to stay organized. Then, actively plan your upgrade approach.

Here's my framework for upgrading customers:

1. List the problems you are currently solving for the customer (note - problems you are solving, not products they are using)
2. Identify the problems you should be solving for the customer that you are not yet addressing
3. Identify who is likely responsible for solving the problems you should be solving

Here’s what that might look like:

Customer Name	Problems We Currently Solve	Problems We Should Be Solving	Contact Responsible for Solving
ACME	Increasing first call resolution	Decreasing # of product returns	Danny Green - VP Quality Assurance

If you are successfully solving the problems they purchased you to solve, you’ve earned the right to solve additional problems. Request referrals from your champion using this “problems we should be solving” framework and you’ll earn introductions that will help you expand your agreements.

Conclusion

You'll be well ahead of your peers after organizing your territory with these Frameworks. A great plan with a good territory will beat a poor plan with a great territory every time.

After implementing these initial Frameworks, you will have a great structure to enable every AE's favorite activity: effective pipeline generation (sorry, couldn't help myself).

Let's move on to that section.

Pipeline Generation

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Introduction

A LinkedIn comment caught my attention: “I wouldn’t work for a company that expected me to generate most of my pipeline. Most execs I’ve worked for just want me closing, not doing SDR work.”

I get the opinion here. “I’m a closer! I get paid to close deals!”

The reality is, people that only close qualified pipeline aren’t that unique, and aren’t that valuable.

If you are dependent on other sources for your quota success, guess who loses their sales job as soon as those sources slow down their pipeline generation?

If you aspire to be a differentiated and valuable seller, there’s nothing that will set you apart like an ability to source, progress, and close high-quality deals.

I’ll admit I’m passionate and biased towards this subject.

As an AE, I self-sourced nearly all of my deals.

As a sales leader, my orgs have consistently sourced 80%+ of our won revenue.

In my current role, I lead an acquisition sales org that only focuses on net new accounts (no upsell/cross-sell) and my team sources 90%+ of our revenue.

While I hope you receive plenty of support from SDRs, marketing, and other sources, my goal is to equip you with Pipeline Generation Frameworks that will ensure your success even when your supporting functions let you down.

Let’s dive in.

Identify and Understand Prospects

Just as you need to understand the types of companies most likely to have a strong use case for your solutions, you need to understand the contacts/titles within those accounts that are the most likely to benefit.

These personas should be readily available from your enablement team or sales leadership. If they aren't, grab my Free Persona Builder and you can use ChatGPT to get a solid start.

If you previously purchased my AI Frameworks, you'll find the same prompts (and more) in that product. No need to download the free version.

Once you can comfortably identify your target prospects, you must develop a deeper understanding of those personas. That requires looking beyond the descriptions most companies provide their sellers.

Understand Priorities of Key Contacts

A big mistake companies make when onboarding new sellers is starting with product training.

Understanding your prospects' problems and priorities is much more important than knowing your product.

Before you could ever hope to articulate how your solution can help, you need to know what's top of mind for your target prospects: what they care about and how they are measured.

To learn these, read job descriptions for open roles in the same department as your target prospect. The tasks and expectations assigned to a product manager are likely related to the VP of Product's priorities.

If no open roles within the account relate to your prospect, look for comparable positions at competitors. This level of research is generally sufficient to begin understanding your prospects at a deeper level.

I recommend organizing this information in a "Buyer Persona Matrix." Here's what it could look like:

Department	What individuals care about as it relates to business outcomes	How individuals spend their time to achieve business	What individuals often struggle with to achieve those business outcomes	How the database solution may be able to help individuals in each department
Engineering /Dev	Faster development cycles, meeting project deadlines, reducing errors, and achieving better software quality	Coding, testing, debugging, integrating software components, and ensuring software scalability	Integration challenges, debugging, software issues, meeting deadlines, and ensuring quality	Helps engineers develop applications faster, automated scaling and integration, reducing coding errors, and increasing efficiency
Product Management	Faster time-to-market, launching successful products, and achieving higher customer satisfaction levels	Conducting market research, Identifying customer needs, creating product roadmaps, and launching products	Identifying market trends, defining product requirements, ensuring customer satisfaction, and reducing time-to-market	Help companies get new products to market faster by automating database processes, enabling better decision-making, and improving customer experience

Notice how much of this understanding is about the prospect instead of the product:

What they care about, how they spend their time, and their struggles come before "how might our product help."

Again, my free Persona Builder can help you create these quickly.

If you don't understand your prospects, no channel or approach will work for prospecting.

Once you have this foundation, you are ready to build a strong point of view you can use for successful prospecting.

Point of View

One of my favorite quotes is, “Have a strong opinion, loosely held.”

I apply this to both prospecting and discovery: I’d rather my team show up with a slightly wrong point of view than no point of view at all.

Your point of view should be built from your knowledge of the account and of the prospect. The previous sections have provided the foundation for building your point of view, this recording of how I build a point of view will help you cement your understanding.

I strongly recommend taking 15 minutes to watch this video before moving on to messaging: Building a PoV

Messaging

Emotional Relevance Framework

It’s impossible to have effective messaging without understanding your prospects' priorities (which is why I included the previous section).

However, it’s common to have ineffective messaging even with that understanding. This framework is to help you optimize messaging once you have the required foundational knowledge of your prospects and your value proposition.

This framework is also channel-agnostic: it’s applicable for cold email, cold calls, inMails, or any other verbal or written outreach. I’ll write it in terms of written outreach, but every aspect also applies to cold calls.

I call my messaging Framework “Emotional Relevance.” I coined this term after I received an email that completely changed my perspective on personalization.

I had taught (for years) that emails needed to be personalized. AI driven sales automation tools have made it easier than ever to be personalized... which means it no longer stands out.

My inbox is full of personalized emails. References to Zelda (from my stupid jokes on LinkedIn), my previous employer, my current employer, my hobbies, literally anything and everything that the internet can surface about me is included in these ultimately ignored emails.

I'm at the point where you could literally write my biography, attach it to your cold email, and you still might not get a response if it's not relevant (ok I'd respond if you wrote my biography but I won't promise a meeting).

Here's the email that changed my perspective:

"The best managers are never surprised. But now that most of us are remote it's getting harder to stay on top of our metrics.

You shouldn't need to refresh 40 browser tabs every 30 minutes just to stay up to date on how your team is performing.

What if you could close those tabs and get alerted (on your phone) when a metric needs your attention?

Nothing falls through the cracks. No more tabs, spreadsheets, and surprises.

Click here to schedule time to learn more."

Let's break down why this was so effective:

"The best managers are never surprised."

This opener evokes an emotional response. Yes, I aspire to be a "best" manager. Yes, I hate being surprised.

You have my attention, cold email (much more than 'I saw you liked Jen Allen-Knuth's post on LinkedIn about how...)

"But now that most of us are remote it's getting harder to stay on top of our metrics."

This is an effective sentence because it's:

- Timely (my team was transitioning to remote work)
- Relevant (understanding key metrics is a core part of my job)

"You shouldn't need to refresh 40 browser tabs every 30 minutes just to stay up to date on how your team is performing."

I couldn't have written a more accurate sentence to describe my current state had I tried.

I want to reiterate how critical this is: the sender of the email understood how I was spending my time, what I was trying to accomplish, and why it was a problem. That is the ideal you want to aim for when thinking about personalization/relevance.

"What if you could close those tabs and get alerted (on your phone) when a metric needs your attention?

Nothing falls through the cracks. No more tabs, spreadsheets, and surprises."

After describing my (painful) current state, the email proposes an ideal after state. Compelling.

The only point this email missed is proof - where is the evidence that you can actually help me in the way that you are claiming? Interestingly enough, after evaluating this vendor we didn't move forward because they couldn't pull it off... so maybe they didn't have any proof to share.

Still, a (nearly) perfect email that shows most of the Emotional Relevance Framework:

1. Drive emotion by connecting to their aspirations and concerns
2. Show you understand their current role/day-to-day
3. Clearly explain your proposed after state – don't leave them wondering, *"ok, but what do you actually do?"*
4. Provide evidence that you can actually back up your claims

If you are newer to sales, the above Framework is more than enough to get you significantly improved results in prospecting.

If you are more experienced, let's layer on a couple more "checks" to ensure your messaging is as close to perfect as possible.

Messaging - Specificity

One of my favorite ways to check for effective cold outreach is what I call the "competitor's website test."

It's extremely simple:

Can you find the exact value proposition you used in your email on your competitor's website?

If so, it's too generic.

I get tons of emails promising "increased revenue, increased rep productivity, improved forecast accuracy."

The reason I don't respond isn't because I don't care about those things. It's because saying, "we help companies increase revenue" doesn't answer three key questions for me:

- "How are you different?"

- "Why does it matter?"

- "How can you prove it?"

Leading with value isn't enough to get attention anymore.

Instead, you should lead with differentiated and defensible value.

Messaging - CEO Test

We asked the CEO of MongoDB what type of cold outreach earns his attention (he gets a TON).

Here's what he said:

1) Outreach that proves you understand his problems

2) Evidence you work with someone he trusts (internal or external)

3) Specific and relevant proof points

When reviewing your messaging, ask:

- "What problem does this seem to solve? Will my prospect care?"
- "Who do we work with that my buyer might know and respect?"
- "Does this proof point match the problem they care about?"

And if you can answer favorably, you're on the right track.

It's shocking how much bad messaging I see. Apply what you learned in this section, and I'm confident you'll stand out.

However, even perfect messaging isn't enough for sustained pipeline generation success. You need an operating rhythm.

Read on to get the operating rhythm that's propelled my sales orgs to the top of the leaderboard for pipeline and revenue generation.

Prospecting Cadence / Strategy

Most AEs don't know what a Good Day for prospecting looks like, and it's likely their sales leader's fault.

Everyone knows the basics:

- You need to follow-up! It takes 6-8 touches to get a response
- You need to use multiple channels! Cold call, email, social, etc

But many struggle staying organized and focused on high-impact activities.

My "Good Day Framework" will keep you focused on revenue-generating activities.

Metrics to Track and Success Criteria - Good Day Framework

There are many top-of-funnel metrics organizations track: call to contact, contact to conversion, talk time, response rate, etc.

This framework is how I've measured daily effectiveness for myself and my teams over the last several years.

It was the first framework I implemented when I joined MongoDB. As a result, the team doubled pipeline coverage from my first quarter to my second quarter.

It's also been, by far, my most popular framework outside of my "real job." I frequently get notes from AEs that have implemented this and are enjoying higher levels of productivity.

In fact, I've never seen an AE miss their annual quota when they've implemented this Framework.

Here's what to measure:

Prospects Added to Cadence: Finding a new prospect and reaching out to them for the first time.
Why I use it: Consistently adding new prospects to your outreach prevents a "stale" list from forming.

Prospecting Calls with Conversations: Cold call that results in a conversation (including rejections).
Why I use it: Tracking conversations instead of calls prevents incentivizing mindless calls to contacts you know won't answer. Lots of calls with no conversations is a waste of time.

Custom inMails/Emails sent to Manager+ level contact: No templates here! These are intended to be 1:1 valuable messages sent to senior contacts in your target accounts.
Why I use it: Successful prospecting requires multiple channels, but automated sequences don't often work for higher level prospects.

Initial Meetings Set: Receiving confirmation that a prospect is willing to meet with you for the first time.
Why I use it: I've yet to find a better leading indicator for an AEs success than the number of initial meetings they are setting.

Opportunities Created: Converting an initial meeting to an opportunity satisfies this criteria. For the purposes of this Framework, consider a deal to be an opportunity if your prospect wants to continue the conversation after the first meeting.
Why I use it: Tracking initial meetings set and opportunities created gives an idea of volume and also efficiency by seeing how many meetings convert to opportunities.

Personal Development: An hour spent on personal development (learning business models of key accounts, learning about prospects' priorities, improving sales acumen, etc.)
Why I use it: The best reps consistently improve themselves. Daily development compounds.

Here's how to track (target is eight points per day):

Prospects added to cadence: *One point per ten contacts added*
Prospecting Calls with Conversations: *One point for each*
Custom inMails/Emails sent to Manager+ level contacts: *One point per five messages sent*
Initial Meetings Set: *One point for each*
Opportunities Created: *One point for each*
Personal Development: *One point for an hour (max one point per day)*

Here's what a successful day could look like:

Twenty new prospects added to cadence	Two points
Two correct contacts	Two points
Five messages sent	One point
One IQM set	One point
One opportunity created	One point
Personal development completed	One point
TOTAL	**Eight points**

Objection Handling

I hate the phrase "objection handling." Objections aren't meant to be handled, they are meant to be understood and addressed.

I want to touch on this subject and share the perspective of a buyer, using a personal experience:

A few months ago, I received a cold email pitching me a SAAS solution for prospecting engagement (basically an Outreach/Salesloft/Gong competitor).

I responded by saying, "This isn't my priority. Best of luck with your outreach!"

The AE responded immediately to "handle" my objection: "Just to confirm - closing more deals faster isn't a priority?"

I understand the approach and why it's taught. "What sales leader wouldn't want more deals, faster?"

The idea is to "trap" the prospect into a question they can't say "no" to. It's a technique taught to sellers, but it completely misses the point of your buyer's likely objection.

Put yourself in my shoes: We already have a similar solution implemented to what was being offered, and I have no idea if or how this vendor is better.

I've aligned with my boss and my team on the best route forward for closing more deals faster, and it's improving our efforts in a completely unrelated area to what the seller was pitching.

So the seller is 0/2:

1) We use a competitor, it's working fine, and I don't know how you are different
2) Even if we didn't have a similar solution in place, I've already decided to invest my time and resources elsewhere

Here's the key takeaway: I was not objecting to the proposed outcome. Closing more deals faster is **always** a priority for me.

I'm just already working on that priority and I have no reason to believe the seller's solution is a better approach. We've identified tools that support our priorities, and we are in execution mode.

When you get a no, don't fall back to the high-level outcome:

- "Oh, you don't want to save money on your HR solutions?"

- "Really, you don't want to reduce the risk of getting hacked?"

- "Huh, you don't want your developers to be happy and productive?"

Of course your buyers want those outcomes. If they are objecting, they likely either:

- Don't believe you can drive that outcome

- Believe a different approach will work better

You need to find out which of those your objection falls under and address that for better success.

A question like, “Makes perfect sense you’ve already got a handle on this. Usually this means you’ve got a similar solution in place and I didn’t do a good job sharing how we are different, or you are attacking this priority through a completely different approach.

Can I ask where you fall?”

I hesitate sharing scripts for anything, but hopefully this gives you an idea of what an objection really means to your buyer, and how you can better understand their perspective.

Pipeline Generation Diagnosis

Implementing these initial Frameworks will improve your success in pipeline generation. But, even with improvement, you'll still have "dry spells."

When you hit a slow period, you can use my three-step diagnosis framework to make sure you are using the right messaging, with the right contacts, within your best accounts.

This diagnosis is a quick summary (and application) of what we covered in this section.

Here are the questions to answer:

1) Are you calling the right accounts?

Here's what to look for to make sure you are focused on the right companies:

- *Potential budget*

Are they investing in areas tied to your solution?

For example, at MongoDB we look for companies hiring developers. Hiring developers = building applications = spending money on databases.

- *Use case*

Are there multiple landing spots for your product?

For example, at Qualtrics I focused on accounts that needed to understand brand, customer, and product experience. Three different use cases = three shots to win business at the account.

- *Personal Familiarity*

Massive budget and multiple use cases won't help you land an account if you can't speak their language.

Simple question to ask yourself: "If I was in a room with their executive team, could I have a conversation about their business, in their language, without being completely out of place?"

Good accounts that you understand are better targets than great accounts that you don't understand.

2) Are you calling the right contacts?

Two questions to ask about the contacts in your sequences:

- Would this person personally benefit from our solution?

- Is this person responsible for solving the business pain our solution solves?

No personal benefit = no reason for them to respond.

No connection to business pain = no reason for you to want them to respond.

3) Messaging

Two main points I'm looking for in effective messaging:

- Emotional relevance

What is the email/phone call your buyer never wants to get from their boss? If your email shows them a way to avoid that dreaded call, it's emotionally relevant.

- Specificity

Could you write the same email to a different person? Or, could your competitor send the same email to your buyer?

If the answer to either of those questions is "yes," your messaging will benefit from more specificity.

Conclusion

Most sellers want to focus on “advanced skills” - presentation, negotiation, value selling, etc.

While I strongly endorse improving those skills, the vast majority of sellers will see a more significant impact on their revenue by first:

1) Mastering territory management
2) Accelerating pipeline generation
3) Improving accountability to daily effort

Incrementally increasing win rate is not as impactful as significantly improving pipeline generation. Consistently delivering strong pipeline generating activities will produce more than mastering negotiation.

Once you’ve mastered these fundamentals and have an ingrained operating rhythm, improving your other skills will have a more significant impact as you deploy your talent across a larger funnel of opportunities.

And maximizing that larger funnel of opportunities will require effective discovery.

Let’s move on to that section.

SALES INTROVERTS

Discovery

CONTENTS

Introduction

I've observed hundreds of discovery calls in my career - many feel uncomfortable until a key shift occurs.

The tension comes from buyer skepticism:
- Does this rep know anything about me?
- Are they going to push me to buy, even if it's not a fit?

Fair or not, buyers enter sales conversations with skepticism.

My Discovery Framework is full of tactics to reduce that skepticism, so you'll find your discovery calls turning into conversations.

There are two sections:

- Discovery Pitfalls
- Discovery Exercises

The pitfalls section addresses the seven most frequent and detrimental mistakes sellers make in discovery and how to avoid those mistakes.

The concluding section provides two exercises you can do today to enter future discoveries prepared to add value while differentiating yourself through effective selling.

SALES INTROVERTS

Discovery Pitfalls

PITFALL #1:

Setting an agenda, not an objective

Many discoveries start by the seller setting the same agenda:

- Mutual introductions
- Discuss your role and challenges
- Overview of our product
- Agree on next steps

The problem with this agenda is that we "take" from the buyer with questions before they are sure talking to us is a good use of their time.

The sole reason why someone takes time for your discovery is so they can determine if and how you can help them. If a buyer is not confident from the beginning that you'll quickly answer the question "what can you do for me," they will be less willing to answer your discovery questions.

Executives with discovery fatigue are unlikely to answer your questions patiently and will often counter with some form of: "you asked for this meeting - why don't you just tell me what you do?"

Starting a discovery call by setting the objective rather than an agenda is the best way to earn the right to ask discovery questions, even with the most senior of buyers. It's a subtle but important difference: objective is what we'll accomplish, an agenda is just how we'll spend our time.

When done correctly, it sounds something like this:

"By the end of the call today, I will be able to tell you specifically how our solution will help you drive [relevant positive business outcomes]. To get to that point, I will need to understand your role as it relates to [relevant current state]"

For a seller of a forecasting solution, selling to a VP of sales, it may sound like this:

The Give (highlighting positive business outcomes)

"By the end of the call today, I will be able to tell you how our solution will improve forecasting at the company, region, and team levels. I'll also help you understand how you can increase win rates by surfacing key deals to your visibility earlier in the sales cycle."

The Ask (better understanding their current state)

"Before providing specific recommendations, I will need to understand your role as it relates to forecasting and deal reviews."

Moving from setting an agenda to setting an objective is a subtle shift. Still, when the prospect understands your commitment to providing what they care most about before the end of the call, they are more willing to share more about their processes, goals, and pains. When they are confident they will receive what they care about within the first call, they will be less likely to interrupt your discovery with, "why don't you just tell me what you do."

PITFALL #2:

"Tell me about your role"

I hate this question. When I'm asked this question, I never know how to answer.

Do I talk about coaching? Forecasting? Recruiting? Performance management? Territory management?

My role has many elements - I don't know where to go.

It also makes me question the seller: "If you don't even understand my role, why do you think you can help me?"

That's why in the previous section I recommend getting specific from the beginning: "tell me about your role as it relates to [relevant positive business outcomes]."

This is much more effective than "tell me about your role" for a few reasons:

1. No one wants to explain their role every time they get on a sales call.
2. Much of their role likely has nothing to do with your solution.
3. Asking someone "tell me about your role" indicates you are unprepared for the call. A senior buyer will likely get impatient with this question, thinking, "if you don't know what I do, how could you presume you could help me?"

Think about the psychology of the buyer:

- They are not likely looking forward to a discovery call with a stranger
- They question whether or not you know enough to add value to their role
- They are concerned that the discovery meeting will only benefit you, and not them

Starting off the call with, “tell me about your role” validates those concerns, and will lead to them mentally checking out.

Making it clear to your buyer that you are educated about what they do and what they care about will set a peer-to-peer tone for the conversation that leads to deeper discovery.

To reiterate the simple shift:

Instead of, “tell me about your role” try, “tell me about your role as it relates to [relevant current state].

Avoiding the first two pitfalls in this section will help improve the tone of your discoveries from the beginning.

Read on to ensure you don’t make crippling mistakes as the conversation progresses.

PITFALL #3:

Front-loading discovery questions

Most sellers understand that discovery should have roughly even talk time for the seller and buyer. Unfortunately, even when a 50/50 split is achieved, it often ends up being an interrogation for the first half of the call and then an ineffective “demo through words” monologue for the last half.

Equal talk time, but still a miserable experience for your buyer.

The most effective discovery calls are comfortable conversations, where the seller works to add value throughout the call, and talk time is balanced throughout the discussion.

“But how can I add value when I’m still trying to understand the prospect?” you might ask.

Great question! (fun fact - it’s a pet peeve of mine when someone says “great question” when someone asks a very normal, not great question).

My favorite way to add value while still asking questions is by adding context to questions. My go-to phrase is adding, “the reason I ask is…” and then I share either a customer story or a relevant industry insight.

Let's again use the example of selling a forecasting solution to a VP of sales to show how this might sound:

You could ask:

Question

"How are you currently determining which deals you should personally be reviewing with the rep?

Context

The reason I ask is {company name} improved their win rate for $50k+ deals by 15% after moving beyond the common practice of prioritizing by deal size, and I'm wondering which other deal criteria may be influencing your involvement."

Think about the power of this context:

1) We shared a proof point that ties back to a positive business outcome the buyer cares about

They might think, "I'd love to improve our win rate in that deal size segment."

2) We challenged how they are likely selecting deals for review

They might think, "Dang, that's how we are currently picking deals, I wonder what we are missing."

This simple change will not only lead to more balanced conversations (less interrogation), but will also lead to more thought-provoking questions and answers.

PITFALL #4:

Not extracting the "so-what"

Take a look at your notes from your most recent discovery conversations. Do they all look pretty similar? If so, chances are your discovery is too superficial.

Here's what I used to see when reviewing deals at Qualtrics:

Current State: Data silos, poor analytics.

After State: Reduced data silos, improved analytics.

When I see this, my first question to the seller is, "so what?"

Data silos aren't always a bad thing - why is it bad for your buyer? Improved analytics sounds nice... but so what?

What business decisions are going to be positively impacted with improved analytics?

What types of data will we be able to surface that they currently can't access?

Sellers are good at asking questions, writing down the answer, and moving on to the next question. Sellers are terrible at pausing, looking at what they wrote down, and ensuring they can articulate the impact, or the "so-what," before moving on to the next topic.

"We are operating with data silos" should be met with "I've seen different issues come from data silos- can you help me understand what's particularly painful about your situation?"

"We need better analytics" should be met with, "What types of opportunities has the business missed by not fully understanding your data?"

This leads to deeper discussion than just writing down the first thing your prospect says and moving on to your next discovery question.

PITFALL #5:

Seller only prepares to learn, not to teach

Most sellers understand the importance of preparing for discovery meetings. However, that preparation is usually spent on:

- What do I want to learn from the buyer?
- What questions should I ask to uncover that information?

Your competitors are also preparing to meet with your buyers, and what they want to know/what they plan to ask matches your list.

Think about what this means for your buyer in a competitive evaluation: They will sit through several discoveries, being asked the same questions, and giving the same answers.

It’s like groundhog day but way worse because it’s a sales call on repeat.

The best way to stand out from the competition is to ensure your buyer leaves the conversation feeling like they gained value; they didn't just answer questions.

For your ideal buyers, I recommend spending as much time planning what you will teach your buyer as you spend preparing the questions you want them to answer. While your competitors badger them with all the same questions they've heard repeatedly, you will be able to intermix your questions with insights that matter.

Hopefully this reminds you of Pitfall #3 where we learned to avoid “interrogation.” This research will help you identify valuable context to add to your questions.

Here are some areas to focus your research on:

● Research conducted by your company that supports best practices for their use case
● Relevant customer stories (people love to learn about others with similar challenges and changes they made)
● Industry trends/challenges (try Googling, "challenges facing *insert industry*")

Don't feel pressure to tie these teachings back to your product/service. The goal is to leave your buyer feeling they received value by meeting with you even if they never purchase your offering.

Average sellers differentiate only with their company's offering. Elite sellers also differentiate by adding value in every conversation. Your buyers will be more willing to continue the conversation if you add value during discovery.

PITFALL #6:

Being afraid to ask for clarification

When you put someone in a stressful situation, they will naturally avoid behavior that may appear weak or unconfident. Even tenured reps (including myself) can find discovery conversations stressful.

Unfortunately, many sellers feel that admitting confusion is a sign of weakness and have a hard time telling their buyers that they aren't understanding their explanations of their current state, challenges, or goals.

This avoidance is a massive problem: pretending you understand what your prospect is saying ruins your discovery.

When reviewing calls, if I hear a rep say, "that makes sense," I'll usually pause the recording and ask them, "did that actually make sense to you?" They often admit they didn't fully understand what the prospect was communicating; it was more comfortable moving to a new topic rather than admitting confusion.

But let's think about a potential devastating impact on your buyer's psychology:

1. They just walked you through a complex problem they are facing
2. They know that it didn't fully make sense to you (it barely makes sense to them)
3. You lied to them about it making sense and decided to move on rather than take time to actually understand them

Yikes.

If you don't understand their problem, how are they going to trust your proposed solution?

And, even more impactful: If you are willing to lie about understanding something, how are they going to trust you?

The good news is that avoiding this pitfall is simple: don't be afraid to admit you are slightly confused or even completely lost.

The best sellers are comfortable asking for clarification, further explanation, or even a restart and rephrase of what their prospect is communicating. Qualified prospects would prefer taking extra time to align understanding rather than waste time later sitting through an irrelevant presentation.

Instead of "that makes sense," try, "I'm not sure I'm following. Can you explain..." and you'll have more meaningful discoveries.

PITFALL #7:

Staying on Level One Questions

The fastest way to lose my attention in a sales call is to ask me a question that you could easily have learned on your own.

Discovery calls are too short to spend time on surface-level questions.

Instead, show up prepared to skip past surface-level questions and get right to interesting conversation.

Simple example:

Instead of “where are you based?” (surface-level question answered by my LinkedIn + website bio)

Try: “I bet moving to Chicago after so many years in Utah was a big change. What’s been the best part? Anything you miss?”

Skipping past Level One questions whenever possible is critical, because your buyer gets agitated and restless when you spend discovery calls covering Level One questions.

Here’s how we can define “Levels” of Discovery, along with examples:

Level One: Public Knowledge

Questions like...

“How does your company make money?”

“Can you tell me about your role?”

“How long have you been with [company]?

Level Two: Department/Org Specific

Questions like...

"How is your team currently supporting [company goal]?"

"If you were writing up the headline to announce the outcome of this project, what would you want it to say?"

Level Three: Individual Specific

Questions like...

"If successfully implemented, what would this enable you to accomplish that you can't today?"

"And for you, personally, how could this impact your career goals?

Spend a bunch of time in discovery on Level One questions, and you'll get, "Why don't you send me a case study, and we'll get back to you if we want to learn more."

Spend time on Level Two questions, and you'll get qualified opportunities.

Get to Level Three questions, and you'll get Closed/Won opportunities.

I need to credit my friend, Nate Nasralla, with some of these fantastic questions. He's a brilliant seller, author, and founder - you can see his work here.

Congrats on making it through the seven discovery pitfalls!

We'll conclude this section with exercises to help you apply your learnings.

Discovery Exercises

Exercise #1: Initial Analysis of Prospect's Current State

List the primary responsibilities of a prospect's role (related and unrelated to your solution). To find these, pull from their LinkedIn profile, job descriptions of open positions within their department, or job descriptions of similar roles at similar companies.

Once you've defined their responsibilities, highlight the aspects of their role that pertain to your solution.

These are the areas where you will want to uncover further detail around their current process.

Related to Pitfall #1, these responsibilities make up the relevant current state from the objective set: "To get to that point, I will need to better understand your role as it relates to [relevant current state]."

Prospect's Primary Responsibilities	Related to your Solution (Y/N)	Current State (fill in during discovery)
Responsibility #1		
Responsibility #2		
Responsibility #3		
Responsibility #4		

Exercise #2: Value Hypothesis

In addition to understanding your prospect's general role and responsibilities, you also need to understand their priorities.

Make a list of all the outcomes your prospect is likely trying to drive. Then, isolate the outcomes that your solution influences.

These are the areas where you'll want to prove your solution can improve for your prospect. In other words, these outcomes make up the positive business outcomes in the objective setting phrase: "...I will be able to tell you specifically how our solution will help you drive [positive business outcomes]."

If you get to the end of discovery, and they still don't have a concrete understanding of how you can specifically help them, they will be unlikely to schedule the next event and will defer with some form of "send me some case studies, and I'll review with the team." You can decrease this risk by coming to the conversation with a semi-baked value hypothesis prepared.

In case you missed it earlier in this book, you can see how I build a point-of-view for a prospect here: PoV Building

Prospect's Primary Outcomes	Impacted by your Solution (Y/N)	Value Hypothesis (bring to discovery and validate)
Outcome #1		
Outcome #2		
Outcome #3		
Outcome #4		

Conclusion

Discovery calls can be unpredictable - you don't know which directions the conversation will go.

That unpredictability is stressful for sellers.

While you can enter the call with some hypothesis, it's impossible to plan too much of the call in advance without falling into the trap of following a script. Leveraging these frameworks will help you enter discovery with more confidence, and maintain control of a value-driven conversation.

Mastering this will take more time and effort than using the same pre-planned questions for each discovery, but the payoff will be well worth the investment.

As soon as you are ready, let's move on to the Solution Presentation section of this book.

SALES INTROVERTS

Solution Presentation

CONTENTS

Introduction

While you can't do an effective solution presentation without a great discovery, you can certainly ruin a solid discovery by following it with a lousy presentation/demo.

This section will help you accelerate your understanding of running an effective presentation.

Similar to the discovery portion, there are two parts:
- Solution Presentation Pitfalls
- Solution Presentation Exercises

The pitfalls section addresses the eight most frequent and detrimental mistakes sellers make in presentations and how to avoid those pitfalls.

The concluding section provides three exercises you can do today to differentiate through effective presentations.

PITFALL #1:

Ineffective use of slides

I've seen many sellers start their presentations with an apology: "I know no one likes slides, but..." and then they proceed to walk through irrelevant content and lose their buyers' attention right from the beginning.

And once you lose attention in a presentation, it's nearly impossible to get it back. Slides aren't inherently bad, but having too many or misusing them is a great way to crush buyer engagement.

I'd argue that no presentation should have more than eight slides. If you need to cover more content than you can include in eight slides, consider a different format for that content or break the content up into separate meetings.

Some reps are skeptical of my eight slide rule. If you are used to using the enormous deck marketing built for you it seems like a drastic change.

Start by understanding my rules for slide inclusion and elimination:

Eliminate:

Company History/Accolades

People that care about your company's founding story: your founder's parents.
People that care about your revenue/growth rates: your investors.
People that care about the random awards you paid to win: your marketing team.
Cut these slides out.

Customer logo slides

No one cares that irrelevant companies bought your software.

Putting Microsoft on the slide after selling them a 3-user pilot isn't convincing your buyer you are the right fit.

Your competitors have customer logo slides that look the same.

Take this slide out.

(Note - before you yell at me about needing customer stories keep reading - we'll get to that).

Tech/feature-heavy slides

If there's relevant functionality you need your buyer to know you offer, include it in your demo.

Think about buyer psychology: are they more interested in looking at a screenshot of a feature or looking at the feature live?

When given the choice, opt for presenting in the more engaging way. Product screenshots are not engaging, so take them out.

Include:

Slides for Discovery

If there are concepts that require further discovery, include slides that have content geared towards that conversation. This provides a comfortable give/take cadence to add value on a topic while engaging in deeper discovery.

My favorite slide that falls under this category is a slide that summarizes your understanding of the buyer's current state, negative consequences, desired after state, and expected positive outcomes.

It's a great slide to 1) dig deeper with your primary contact(s) and 2) validate and expand when new contacts are added to the conversation.

Software architecture overview

You aren't going to demonstrate every feature your product offers (especially after you've read my Frameworks and applied these lessons). You may even skip significant components that you need your buyer to know you offer.

To ensure a complete understanding of your offering, use a slide that diagrams the major aspects of your solution as you set the demo agenda.

Call out specifically what you are going to show and why. Call out what you aren't going to demonstrate and how it fits into your overall solution, so they know it's available.

Relevant customer stories

Relevant customer stories are different than a customer logo slide!

Here's how to pick the right story to share:

- **Ideal customer story:**
- Similar industry, similar size, similar problem to your prospect.
  This story rarely (if ever) exists.
- **Next best story:**
- Similar size, similar problem.
  I think size is more important than industry because resources matter.
  A small online retailer isn't going to resonate with your Amazon story. Same industry, but completely different scope.
- **Last resort story (still effective):**
- Similar problem to your prospect.
  After you apply these rules, your presentation will likely be a lot closer to eight slides than when you started.
  Even if you don't get to that exact number, you'll have an improved slide presentation that will lead to engaging conversation instead of lifeless monologue.

PITFALL #2:

Only selling towards gathered requirements

Early in my career, I'd get excited when my prospect listed requirements we could meet.

"Yeah! We can do ALL those things!"

We'd get to the demo: I'd show all the things. It would seem to go well - the buyer confirmed we had all the things.

I'd hop off the Zoom and expect to win the deal.
But time after time, I lost those deals to a cheaper competitor.

"Thanks for taking the time to show us your product. Ultimately, we found that our requirements could be met with a smaller investment, and we went that direction."

Blerg.

Buyers aren't experts in your space. They have a detailed understanding of their problems, but a superficial vision of the solution. That superficial vision often means basic functionality that will be offered by all of your competitors.

The result is a bunch of demos that all meet your buyer's requirements... And when multiple solutions "work," the lowest price wins.

To avoid this pitfall, build on what your prospect thinks they need with your product's differentiators. You need to enhance their decision criteria to include features/value that only you can provide.

Done successfully, you bucket your lower-cost competitors as completely different solutions. This makes your higher cost easily defensible.

When done really well, your buyer will eliminate competitors that met their original decision criteria because the capabilities you introduced became requirements for success.

Quick example:

When I sold for Qualtrics, we offered a survey platform that we branded as "Experience Management." Our differentiator was we could execute market research, customer experience, employee experience, product experience, and brand experience on one platform.

Every time I competed in a customer experience deal, I would work to convince the customer that measuring customer experience without also measuring employee experience was a waste of money.

When I won, the buyer shifted their requirements from "we need the features of a customer experience platform" to "we need a platform that can do both customer and employee experience research."

All of my competitors could do customer experience.

Only we could do both.

So once I changed the decision criteria, the wins were easy and the higher cost was defensible.

If you sell for the low-cost provider in an industry, you can tweak this motion to your advantage.

Explain to the customer what your higher-cost competitors will claim are differentiators. Then, explain why your buyer wouldn't see significant benefits from those "bells and whistles," and take a confident position in providing a solution that "does everything you need without asking you to pay for what you don't."

If I were selling against myself at Qualtrics (using the above example) I would use this play:

"Qualtrics will tell you how you need to add employee experience to your customer experience program. I couldn't agree more! They go great together.

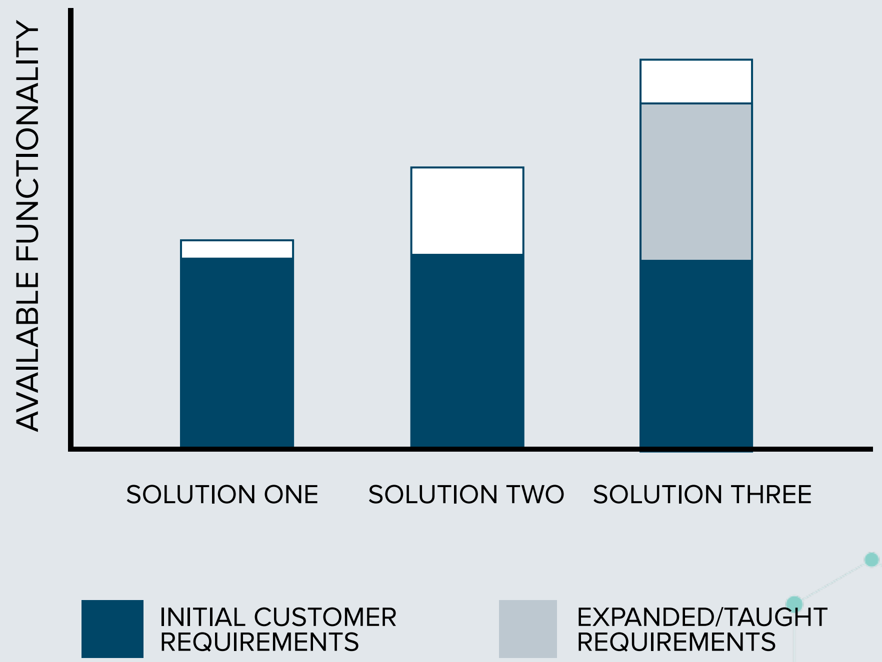
But based on your team's bandwidth and priorities I'm skeptical you could get both programs up and running quickly.

Why not start with a cheaper, faster to implement customer experience solution and then add employee experience when you are ready?

If you actually outgrow us (most of our customers stay with us for years) I'm sure Qualtrics will tell you how easy it would be to import the data you collect with us into their platform when the time comes.

That way, you aren't paying a premium to run two programs when all you need for now is one."

Remember: it's often not what you sell, but how you sell, that determines who wins.



In this example, Solution One will win unless Solution Three's seller successfully expands the customer requirements beyond what Solution One and Two can provide.

PITFALL #3:

Overwhelming with irrelevant complexity

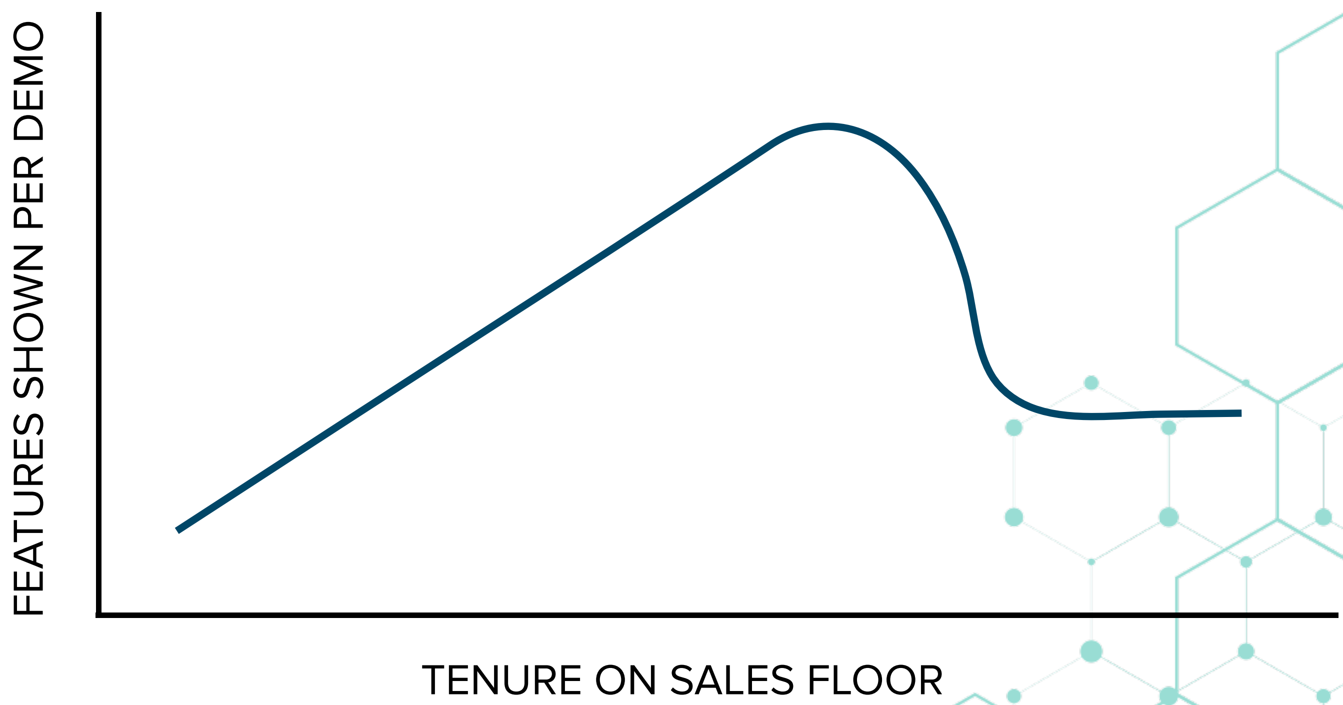
I'm going to apologize in advance for the potential whiplash of pitfalls two and three.

I know I just told you to expand your buyer's requirements. In other words, show MORE than they originally think they need.

Now, I'm going to tell you to not show too much. Please bear with me.

If I were to chart the average number of features I showed per demo across my tenure as an AE, you would see a gradual increase for the first two years as I mastered more of the product.

Then, when I learned "feature dump" demonstrations did not win deals, you would see a rapid decrease in the number of features shown per demo.



Yes, you need to learn your product. No, you don't need to show off how much you know in your demos.

When you show too much, your buyer thinks: "Wow - this looks great... but it's more than I need right now." You might even hear, "This is a Ferrari and all we need is a Honda."

Mastering your product is less about knowing all the features and more about matching features to your buyer's problems and priorities. Less, "Here's all we can do!" and more, "Here's exactly what you need us to do."

The better you understand your solution, the more likely you'll be able to find the best way to solve problems for your customers.

The easiest way to avoid this pitfall is to plan your demo agenda with the question, "how would my prospect use this feature, and how would they benefit?" If you can't answer that question, consider eliminating that feature from your demo. This concept ties directly into the next pitfall.

PITFALL #4:

Your prospect cannot visualize how they would use your solution

Not many people walk into a store, see something that looks interesting, and think, “Wow, that looks cool. I have no idea how I’m going to use it, but I’ll buy it anyway and figure out how to use it later.”

B2B buyers are the same: they won’t purchase a solution they can’t envision in their environment.

A strong high-level overview gets a buyer to agree to a demo. Knowing exactly how they’d use your solution to solve their problems brings a buyer to sign a contract.

Don’t waste valuable demo real estate with high-level content as your buyer is already past the part of their journey where it is needed.

The way to prevent this pitfall is to eliminate the phrases “high-level overview” and “30,000-foot view” from your product demonstrations. Instead, when prepping your demo ask, “How would the customer use our solution if we gave them access today?” and then show them a demo that aligns as closely to that as possible. If that answer is unknown, do not move onto the solution presentation stage of the deal.

If you can’t answer that question before your demo, then your customer won’t be able to answer the question “how would I use this solution” after your demo, and no one buys a tool they don’t know how they would use.

PITFALL #5:

Misusing Unique Differentiators

Effectively using unique differentiators can be the difference between winning and losing a deal.

Unfortunately, most AEs use them wrong.

First, the definition: A unique differentiator is a feature/solution you offer that your competitors do not.

AEs love to bring these up in sales calls:

“We are better, because we offer something you can’t get anywhere else.”

It seems persuasive, but gives a concern to your buyer:

“Why does no one else offer this if it’s actually important?”

This concern may put up walls that prevent you from landing the benefit of the differentiator.

To break down this skepticism, unique differentiators require additional defense to answer the question: why does no one else offer this if it’s so important?

Here are two ways to defend unique differentiators so they actually help you sell:

1) Only we can do it because of unique resources

The messaging here is, “Our competitors would love to offer this because of the value it adds
but they don’t have the ability.”

Common examples include more engineering resources and internal subject matter experts.

2) Only we chose to do it because of a unique point-of-view

When it’s apparent your company doesn’t have a resource advantage, you’ll need to defend the point-of-view that led to offering something no one else has decided to offer.

Try these approaches to disarm the skepticism a buyer experiences when they hear you offer something no one else does.

Then, be sure to tie the differentiator directly to their priorities and you’ll increase your chance to win.

PITFALL #6:

Abandoning discovery

“Check-the-box” sellers move out of a discovery mindset after the initial conversations with their buyers.

Top sellers maintain a constant curiosity, leading to ongoing discovery.

I’ve found product demonstrations to be one of the best times to engage in deep discovery. I believe this is because we have the opportunity to give our buyer(s) context for our questions.

Here’s how discovery may play out differently for a vendor selling an analytics solution, based on context:

Initial Discovery

Seller: Help me understand your current process for data analysis.

Buyer: Explains.

Seller: How would more efficient analytics improve your situation?

Buyer: Uhhhhh… I’d analyze things… more efficiently?

Seller: Wanna see a demo?

Ongoing Discovery

Seller: On our previous call, you helped me understand a few gaps with your current analytics process. Let's look at how our solution would handle that process more efficiently.

Seller: Demos relevant analytics functionality.

Seller: How would this demonstrated solution change your approach to analytics?

Buyer: Provides fantastic and inspired answer.

Seller: How would this more efficient approach impact you, your team, and your business?

Buyer: Convinces themselves to buy your solution with their answer.

Excuse the somewhat tongue-in-cheek example, but hopefully you can catch the vision of how a prospect will give better answers when armed with context from seeing your solution.

I've found that deep discovery requires context. Initial discovery helps you get the context you need from your buyer to begin a solution presentation. Then, the context given during solution presentation allows you to go into the deeper discovery needed to win complex deals.

PITFALL #7:

Not applying the Pareto Principle

The Pareto Principle is the concept that 80% of consequences come from 20% of causes. In sales, the most common applications of this principle are:

- The top 20% of sellers earn 80% of the commission
- The top 20% of your territory will yield 80% of your results

I would argue that this principle also applies to how SaaS products are effectively presented.

80%+ of your product is offered by your competition. If you spend most of your demonstration covering that functionality, you look the same. And as we discussed earlier, when solutions look the same, lowest cost wins.

I've seen that most sellers spend 80% of their demo covering the 80% of functionality offered by their competition.

I think you should spend 20% of your time covering that 80%, and call out that you know it's table-stakes functionality that everyone offers. Be direct, using phrases like, "I know everyone you are evaluating offers this - I just wanted you to briefly see that we do as well."

Then, spend 80% of your time covering the 20% that differentiates your product, explaining why it's different, why it matters, and how similar customers have seen value by having access.

Leave your prospect thinking about your unique differentiators they can't live without, rather than wondering why they would pay a premium for a solution that looks like the competition.

PITFALL #8:

Poor Storytelling

Humans love stories. We spend insane amounts of time consuming stories through TV, movies, reading, music, and other channels.

Since we're wired to consume information through stories, why do we often sell with rigid data and boring facts?

The most helpful sales books teach fundamentals through stories (e.g., The Qualified Sales Leader).

I've found that my best-performing content is when I teach through a story.

Unsurprisingly, the best sellers have learned to sell through storytelling.

Here are the elements you need to include to tell compelling stories that sell:

A Relatable Character

Your buyer wants to hear about someone like them facing similar challenges.

A VP of Marketing at a Series B Startup isn't going to relate to how you helped Facebook's marketing team overcome their challenge, no matter how impressive the story is.

You won't often find a perfect match. Here's how I prioritize finding the most relatable character for a customer story (strongest to weakest):

1. Same problem, same industry, and same size
2. Same problem and same size
3. Same problem

Not relatable? Not emotional. This leads to the next point...

Emotional

I believe the best sales stories drive FOMO (fear of missing out). If your story gets your prospect feeling like, “Dang, someone like me that had similar challenges is now doing way better than me?” you have their attention.

Conflict

No complex sale cycle goes smoothly. Sharing how others overcame challenges in getting your solution approved builds confidence that your buyer can do the same.

If your story sounds like a fairytale, it’s less believable. You don’t want your buyer ever thinking, “This sounds too good to be true. What’s the catch?”

Resolution

Avoid the temptation of driving your story home with boring facts. Think story, not case study. Bad example:

“E*Trade increased ad effectiveness by 47% and reduced their research time by 50%.”

Boring.

Better example:

“The E*Trade team used to spend their time digging through data in excel sheets and arguing about what campaigns to run.

Now, they spend their time attending award ceremonies getting recognized for their ad work.

What would your team do with 47% more effective campaigns while cutting research time in half?“

People love stories. Get good at telling stories and watch your win rate rise.

SALES INTROVERTS

Solution Presentation Exercises

Avoiding the previous pitfalls will immediately improve your presentations. Your application of these Frameworks will be accelerated if you take the time to complete these exercises.

Solution Presentation Exercise #1: Differentiation + Value

Build a list of the most common requirements you hear from prospects. For each requirement, include a differentiated feature and its value. Where possible, attach a case study to the differentiators.

Refer to this document frequently until the motion of "if you think you need [common feature], you also need [differentiated feature], here's the value of [differentiated feature] and here's a story that proves it" becomes natural.

Common Requirements	Differentiated Feature	Benefit Differentiated Feature	Customer story
Requirement #1			
Requirement #2			
Requirement #3			
Requirement #4			

Solution Presentation Exercise #2: Eliminate the fluff

Review a recording of a recent demonstration and list every feature shown. Then, highlight the ones your prospect would most care about. Rebuild your demo agenda, remove the non-highlighted features, and include the value provided / case studies from the Differentiation + Value exercise.

Solution Presentation Exercise #3: Effective demo agenda creation

We covered a lot in this section. You can reference my Perfect Demo Agenda Builder to help put everything together.

Conclusion

An inferior product tied to a superior presentation can beat a superior product presented poorly.

Regardless of where your company's product currently stands in the market, you can increase your win rate by applying the principles shared in this framework.

Mastering these skills will take more time and effort than memorizing a demo "script," but the payoff will be well worth the investment. I recommend revisiting this section frequently as you continue your progress towards mastering the complex sale.

SALES INTROVERTS

End of Deal

CONTENTS

Introduction

Next steps are easily defined in the early stages of the deal cycle.

Later in the deal, especially after proposals are shared, sellers frequently lose control. Proposal reviews often end with the buyer saying, “let me sync internally with the team and get back to you on the next steps.” Unless you respond appropriately, this phrase is followed by closed/lost.

When you mishandle the end of the deal, your buyer takes control. This is a problem because your buyer is rarely:

- Trained on effectively selling
- As motivated to buy as you are to sell
- Aware of all internal processes required to obtain approval

These End of Deal Frameworks will help you:

- Better prepare your buyer to sell internally
- Increase your level of control, even in late stages
- Maximize your deal size through effective negotiation

To drive those outcomes, I address the eight most frequent and detrimental mistakes sellers make at the end of a deal and how to avoid them.

PITFALL #1:

Ineffective Multi-threading

Note: I could have included this pitfall in the Discovery or Solution Presentation section as well. Multi-threading should be done throughout the deal cycle.

One of the first things I was taught as an AE was the importance of multi-threading.

But I wasn't taught how. So when I tried to do it I failed.

I got frustrated: why would my champion block me?

This section will teach you what took me lots of failure to learn.

First, understand when you ask for introductions, you aren't just asking them to send a quick email. You are asking them to bet their credibility on you.

If they connect you with a coworker that doesn't end up finding value in meeting with you, it reflects poorly on them. This is magnified at the executive level: no one wants an executive annoyed at them because they wasted their time with a poor sales call!

Here's my framework for successfully multi-threading with your champion:

1. Build their confidence by always adding value when you meet with them
2. Have a valid and specific reason for your request to meet with new stakeholders
3. Detail what will be expected from all attendees (not just an agenda - specifically what role each attendee will play)
4. Share your plan to make sure it's a successful meeting

Here’s what the request could look like:

“Linda, it’s been great working with you to identify how MongoDB could help your dev team improve efficiency.

Last thing we’d want to do is begin a migration without a really clear picture of how our work would impact the broader engineering org - we want to optimize for the long-term.

Typically the CTO is the best person to speak to long-term architecture goals. We’d love to bring Angela onto the next call to bring her up to speed on our goals and planned implementation to see where she would recommend adjustments.

We don't want to waste her time: we’ll prepare an executive summary she can review before the call so we can make the most of the conversation.

The main feedback we’ll want from her is related to the milestones we’ve discussed - now is the right time to change those definitions or timing.

To ensure the call is successful, we’ll also include an executive from our solution architect team- that way, any questions she has can be addressed during the call.”

Following this approach will increase your champion’s confidence in you, earn an audience with others, and ensure you are ready to make those conversations effective.

PITFALL #2:

Confusing the "After State" with "Positive Outcomes"

Most of your sales cycle is spent with people who would either use your product or manage people using your product. For these contacts, outcomes like "ease of use" and "efficiency" will get their attention.

However, once these buyers seek approval to purchase your solution, executives further removed from the usage will be looking for more tangible benefits than "easy to use" and "automated." Executive approval requires differentiation between the After State and Positive Business Outcomes.

The After State describes the new, improved environment your buyer will experience after implementing your solution.

The Positive Business Outcomes need to articulate the impact of the After State, not just expand with additional detail.

Here's what it looked like when I reviewed at Qualtrics, a market research/customer experience company:

After State: More personalized data collection
Positive Business Outcome: Improved response rate for surveys

After State: Automated closed-loop follow-up
Positive Business Outcome: Unhappy customers helped faster

These examples fall short because the Positive Business Outcomes are only more specific descriptions of the After State. Stand-alone, they have no defensible/quantifiable value.

Put differently, the Positive Business Outcomes above fail to answer a "so what?" question from an executive.

Here's how I would revise the above example, increasing detail for the After State and adding a measurable Positive Business Outcome:

After State:

- More personalized data collection
- Improved response rate for surveys
- More "at-risk" customers flagged

Positive Business Outcome:

- Decreased customer churn

After State:

- Automated closed-loop follow-up
- Poor customer experiences are addressed faster

Positive Business Outcome:

- Increased customer retention

When your buyer requests budget from an executive, they need to articulate the impact. The After State answers the question, "What does your software do?" Positive Business Outcomes answer the question, "What impact will it make?"

Don't misunderstand: a compelling After State is not immaterial. While strong business outcomes are needed to secure final approval, an exciting After State is required to motivate your buyer to request that approval.

The next pitfall will help you understand how to differentiate between motivating your buyer with outcomes they care about while enabling them with business impact.

PITFALL #3:

Not motivating AND enabling your buyer

When I joined MongoDB, my org had an issue with deals stalling early. The meeting where things typically ended was a call with our potential champion, the AE, the solution architect, and the AE's manager.

After reviewing several calls and the associated presentations, I realized the problem:

Our value proposition was targeted for the buyer's executives, not our buyer. We were showing our solution was valuable, but our buyer didn't see any personal benefit.

In other words, we weren't motivating our buyers to continue an evaluation of MongoDB.

Unmotivated buyers will not attempt to push your proposal through multiple approvals. Motivated but non-enabled buyers will fail to gain approval. Consistent winning requires motivating and enabling your buyer:

So let's look at how to do both.

Motivate

Individuals evaluating your solution have a full-time job outside of evaluating new vendors. Every hour spent with you and internally advocating for your solution is time away from influencing metrics that impact their core responsibilities and compensation.

If your solution does not motivate your buyer by mapping to a personal priority, your deal will stall as they prioritize their core job over meeting with you.

Here are a few ways to find what motivates your buyer:

- What metrics measure their performance?
- What systems/processes are hurting their attainment of the above metrics?
- How would they measure the success of implementing your solution?

Once you have a motivated buyer, you need to enable them to sell on your behalf.

Enable

Your champion's biggest problem is rarely their boss's biggest problem. It's seldom the company's biggest problem. Armed with only the value your solution brings them, a motivated buyer will often find executives telling them, "This isn't a priority for the business right now - let's revisit in a few months."

You would be devastated to know how many of your "strong" deals died when your contact had a two-minute conversation with their boss ending with swift rejection. Even the most motivated buyers will wilt at pushback from executives if they aren't armed to sell internally.

Fortunately, it's easy to uncover what the business cares about because so much is publicly available (annual reports, recent news, etc.)

In addition to what you can find on your own, here are a couple of questions you can ask:

- What significant changes have the organization made recently and why?
- How would the organization measure the success of implementing your solution?

You'll find your buyer is more willing to answer these questions once you've motivated them by tying your solution to what matters most to them.

Let's look at how these come together using a hypothetical buying scenario, where the seller offers sales enablement software and sells primarily to sales leader personas.

For this solution, let's use these as the After State + Positive Business Outcomes:

- After State: New reps ramp faster
- Positive Business Outcome: Increased rep productivity/quota attainment
- Positive Business Outcome: Decreased cost of sale/increased profitability

If selling to a VP of Sales, which from the above do you think is more motivating to them?

Their promotion path, compensation, and goals align more with increasing new rep productivity (more quota attainment) and less with decreasing cost of sale (increased profitability).

If the seller engages with the VP of Sales and focuses on decreasing the cost of sale, the deal will stall early. Without a clear understanding of how the proposed solution impacts quota attainment, they can't justify engaging in an evaluation..

To gain and keep the VP of Sales' attention, the seller should initially focus on a value proposition of:

Improved Productivity → Increased Quota Attainment → Higher Commission

Now that they are motivated with a personal benefit (higher commission), we need to enable them to sell internally by articulating the organizational value. In our example, that benefit would be increasing profitability by reducing the cost of sale.

Our motivated and enabled VP of Sales is now ready to get executive buy-in with a pitch of "this new solution will decrease our cost of sale by increasing rep productivity."

Which sounds a lot better to the CFO than, “this new solution is gonna help me earn more commission.”

PITFALL #4:

Scheduling check-ins, not progressing meetings

The next steps are easy to define early in the deal cycle. Successful discovery leads to showing the solution, which leads to sharing a proposal for the solution. The seller easily maintains control of the deal through these stages.

However, after the proposal review, the buyer often dictates the next steps:

"Let me talk internally and get back to you."

This is a pivotal moment where the typical seller loses control of the deal cycle by responding with:

"When should we reconnect to discuss internal feedback?"

The next call rarely happens as the buyer cannot progress the deal on their side enough to continue the conversation. The seller ends up “checking in” on the progress the buyer is making while the deal fizzles.

Don’t fall into this trap. Instead, to maintain control, find out who they need to talk to and the priorities for those stakeholders:

"I'm looking forward to hearing their feedback. I'd love to send snippets of our presentation for their review, so they have relevant context. To help me share the most relevant content, can you share who you will meet with and which parts of our solution align with their priorities?"

Once you understand the above, say:

"We've had quite a few conversations - it’ll be tricky for you to easily summarize for your team. I'll put together a couple of slides to help you bring your team up to speed on our previous conversations and why they might find value. Let's grab twenty minutes before your internal sync to get your feedback on what I put together."

Now, you maintain control of the deal cycle by defining a practical next step/reason to continue meeting while also ensuring that you enable your primary contact to sell internally effectively.

PITFALL #5:

Over-indexing on “soft costs”

I was on a call with my team to walk through our business case with our buyer’s Chief Product Officer. A big portion of the ROI was tied to saving their team time.

The AE presented the ROI and asked, “Does that make sense?”

The executive said, “Yep - makes sense” and the AE went to the next slide.
I could tell something was off, so I interjected: “It makes sense, but do you believe it?”

The executive gave a slight laugh, and said, “No.”

Here’s why:

Soft costs (e.g. ‘our solution will save your team five hours a week!) aren’t nearly as persuasive as you think.

An executive will think:

“I’m paying them to spend their time working on that problem whether it’s there or not.”

For soft costs to be convincing, you need to have validated a better way for those employees to spend their time.

Weak example:

“We can save your engineers five hours a week if they no longer need to worry about database maintenance. That’s $500k a year of savings, which is 2.5x more than our solution costs.”

The executive will think: “Part of my fixed cost (salary) is to pay them to maintain the database. I pay them the same, even if they aren’t working on that anymore. I still pay that $500k of salary, and now I’m adding $200k more for a new product.”

Better example:

“We learned from your VP of Eng that if your engineering team had an extra five hours per week to focus on [new product], you’d be able to launch one month early. Your VP of Product estimates the revenue impact of the early launch to be $2 million.”

To save our deal, we had to go back to the drawing board on how ROI was calculated. Fortunately, the Chief Product Officer was willing to engage, we found mutual benefit, and won the deal.

For your deals, take your business case from, “we’ll save your team time” to “you’ll accomplish x and generate $$$ with the time saved” and watch your win rate increase.

PITFALL #6:

Not accounting for Risk of Change

Sellers assume they have a deal as long as their proposed After State is better than the buyer's Current State and are surprised when they lose the deal to "no decision."

Losing to "no decision" does not mean that the buyer didn't see value in the proposed solution. Instead, they weren't convinced that their Current State needed to be abandoned. No decision means your buyer is content to keep their status quo.

Sellers forget that getting to a new After State requires change. Change = risk, and people are risk-averse.

To win, the proposed After State has to be better than the Current State + Risk of Change. As you are finalizing your business case with your buyer, make sure you aren't only quantifying the value of the proposed solution. You also need to mitigate the Risk of Change.

There are a few ways to reduce the Risk of Change:

- Well-defined implementation
- Successful proof-of-concepts
- Early introduction to service partners

However, you'll never eliminate the risk. The only way to have no risk, is to make no change, which means keeping the status quo.

So after reducing the Risk of Change, make sure your buyer understands the Risk of the Status Quo. The Risk of Status Quo should be a combination of negative consequences your buyer is aware of + negative consequences you teach them.

Identifying and teaching negative consequences is an essential skill worthy of its own book.

Fortunately, that book has been written: The Challenger Sale by Matt Dixon. If you haven't read it yet, I strongly recommend doing so.

For the mathematically inclined, here’s how I’d represent this Framework:

You lose when the After State < Current State + Risk of Change

You win when After State > Current State + Risk of Change

You tilt the scales in your favor when you add Risk of Status Quo + After State > Current State + Risk of Change

PITFALL #7:

Negotiating price prior to finalizing scope

I was absolutely destroyed in my first real "negotiation."

I was working on a customer upgrade that included more usage, more users, and more features. The original proposal was a $120,000 upgrade.

I knew there would be negotiation (the customer was notorious for beating us up on price). I wanted $100,000 from the deal.

We went back and forth a few times, and the buyer got me down to my "floor" of a $100,000 increase. Pleased with the result, I sent over the contract for signature.

Then, I got punched in the gut via email:

"Thanks for working with us on price, Kyle. Talked to the team, and we only need half as many users as we thought, 30% lower usage, and we don't need [advanced features 1 and 2].

Can you remove those, adjust the price accordingly, and resend the contract?"

I was stuck. I couldn't go back and say, "Ok yeah we took all of that out but the price stays the same."

The deal ended up around $70,000 of new business - significantly lower than my original "floor" that I had negotiated towards.

My critical mistake was negotiating price before we had confirmed and finalized scope.

Like me, sellers often have a predetermined “floor” for their more significant deals. This number is often tied to quota attainment, promotion qualification, or a goal commission amount.

A savvy buyer will try and get a seller down to that floor as quickly as possible. They keep all potential features, options, and volume on the table and negotiate price off of that “optimal package.” The seller is happy to negotiate because:

1. The buyer seems to want a “premium,” higher-cost option
2. They are still above their floor

After negotiating the price down on that package, which is often at or near the predetermined floor for the seller, the buyer will remove features or reduce volume.

To avoid this pitfall, refuse to negotiate the price until the scope is finalized. When the buyer asks for movement on price, the response should be:

“We are excited to work with you and will certainly ensure we are competitive on price. To prevent unnecessary back and forth, let’s finalize exactly what you need us to provide, and then we can iron out the investment details.”

Once you have a firm commitment on scope, you can safely begin pricing negotiations without the risk of scope (and price) dropping unexpectedly.

PITFALL #8:

Proactive discounting

SAAS pricing is constantly changing and is rarely perfect. We've all had deals where we generate the quote, look at the price, and immediately recognize flaws in the model. Most reps will refuse to put a price that they know is too high in front of their customer and will present a proposal and say, "I've included an xx% discount because of *fake reasons* 1,2, and 3."

In addition to the problem of admitting your solution isn't worth the price, we run into an additional complication: they don't believe they are getting a discount.

I remember negotiating my first seven-figure contract. We made the mistake of presenting a proposal to the business with a 30% discount off the list price. Then, procurement got involved, and they told us that the executive team would not greenlight a signature until they knew they had a good deal.

I explained that we had already baked in a 30% discount and asked procurement to communicate that discount to their executive team. He said, "Kyle, for all I know, you are making that price up. You can say 'list price' is anything, and I have no way to verify if that's true. For my CFO, a 'good deal' is measured from discounts off the final proposal provided to our business."

In that scenario, we had to discount roughly 10% off of the final proposal cost to get the deal done. The lesson I learned is that we don't get credit for proactive discounting:

If the list price is $100,000, but you first show the customer $80,000 and then "sharpen your pencil" down to $60,000, your customer will give you credit for the $20,000 discount they saw, not the $40,000 discount you tell them you are offering.

PITFALL #9:

Conclusion

Even the best-run deals can stall if the seller misses critical details at the end of the deal cycle. Sellers can lose thousands of commission dollars a year by making simple negotiation mistakes.

Applying the principles in this section will help you increase your control of late-stage opportunities, increasing deal velocity, win rate, and deal size.

SALES INTROVERTS

CAREER EVALUATION| SECTION 7

Career Evaluation

CONTENTS

Introduction

Your environment is a key driver for your success. The team you are on, the role you are in, and the company you sell for will have a major impact on your growth and income.

This final section will help you navigate career decisions to maximize development, progression, and earnings.

Finding a Great Company

I've been in sales leadership long enough to watch people make both terrible and fantastic career decisions.

With few exceptions, the great decisions were made with a long-term view, while the bad decisions were short-sighted.

The challenge is it can be difficult to think long-term in our stressful and chaotic profession. One way to think long-term is to apply a framework towards how you think about your current (and potential future) roles.

This section is my framework for career decisions. I used this exact formula when I chose my next role after over eight years at Qualtrics, and selecting MongoDB ended up being one of the best decisions of my career.

While I will share my current weightings for each category, please consider how yours may be different. We are all in different times/seasons of our careers and priorities may differ. Where applicable, I will call out categories that will change weights as my career progresses to help you see how they may vary for you now.

My Big Three - each weighted at 20%

Development/Learning

I've always prioritized learning. The more I learn, the more I can teach. The more I can teach, the greater impact I can make.

Making a significant impact is the domino that makes all my other priorities fall into place.

Company long-term outlook

Especially in a down economy, I want to sell a "must-have" product for a financially stable company. I know many people who accepted roles at exciting startups for obscene amounts of money before losing their jobs shortly after the markets plummeted.

Later in my career, I may be less risk averse, and the weighting for this category may decrease. Please note: financially stable doesn't mean big company. There are plenty of small companies that are financially stable, and plenty of big companies that are bleeding cash.

Success rate of teams

I want to do well because the people I work with are doing well.

Being paid well in a winning environment is better than making more in a losing environment.

I can't imagine any career stage where this wouldn't be a priority.

Winning and losing are both contagious.

Next three (weighted at 10%)

Compensation

I have short-term, mid-term, and long-term financial goals. Understanding cash compensation (and whether or not people are hitting OTE) and equity compensation (vesting schedule, refreshes, etc.) play a significant role in my decision-making.

Further in my career, the compensation weighting will likely decrease as I become increasingly financially independent.

Work/Life Balance

My employer must respect boundaries and allow me to prioritize my family, health, and general well-being as necessary.

Further in my career, the work/life balance weighting will likely increase as my kids grow older and I take on additional responsibilities in the community.

Fulfillment of Job

Fulfillment from work can come in a variety of ways:

- Enjoying the day-to-day
- Impacting self (learning/progressing)
- Impacting others (co-workers, customers)

The weighting for fulfillment will likely increase as my career progresses.

Final two (weighted at 5%)

Promotion Path Clarity

When I join a company, I'm thinking long-term. I like to understand what my trajectory could look like if I made a sizeable impact. Understanding promotion criteria, timelines, titles, compensation, and span of control are all important elements to understand for promotion path.

If I were earlier in my career, this would be weighted higher, as it's important to show trajectory in your career to open up better opportunities.

Office Culture

I'm an advocate for in-office work at least one-two days per week. When I'm in an office, I want the environment to be welcoming and supportive of collaboration.

This would be more heavily weighted if I were in the office more than a small percentage of the time.

Feel free to change the criteria and/or weighting for your purposes! Whatever it ends up looking like, I do strongly recommend having a documented way to assess career opportunities.

Effective Candidate Outreach

I receive a ton of notes from AEs wanting a job at MongDB. This section breaks down what they almost all look like and how you can improve your job-seeking outreach.
Here's an example of what I usually receive:

"I'm interested in speaking with you about the High Tech Account Executive positions MongoDB is hiring for.

I want to apply for the position but wanted to get your insight on the role before applying.

Are you available to talk tomorrow at 10:45am?"

This is what this outreach sounds like to me:

"I think I might want to work for your company. Can you teach me about it so I can decide?"

Instead of putting the "burden" on the hiring manager, try this approach when you are reaching out:

- Share what you've learned about the company

- Share what you've learned about the role

- Share why you think you would be a good fit for the role

- Have a "low effort" CTA

It might look like this:

“Hey Kyle,

Blown away at the market opportunity I’m seeing for MongoDB. Seems like the growth of AI is an accelerant for your go-to-market.

It also seems like Mongo puts a major emphasis on rep development. Combining a huge market opportunity with dedicated rep enablement is incredibly appealing!

I’d love to walk you through how I’ve led my team in pipeline generation and quota attainment the last two quarters to see if my skill set may be a good fit for your org.

What’s the best way to ensure my application is reviewed by a member of your team?”

Outreach like this will immediately separate you from 95%+ of your competition for roles.

Enterprise Sales vs Sales Leadership

At some point, every successful seller that wants to stay in sales will need to decide between staying an individual contributor or entering the leadership path.

There is not a right or wrong answer - both roles offer phenomenal opportunity.

To help you think about your options, I'll share my experience and criteria used for my decision.

I had no desire to pursue a leadership role early in my career. I was wrapping up a fantastic year as an AE, my friends were promoting to the enterprise sales team, and I was determined to join them.

Then, my manager and VP encouraged me to use long-term thinking to inform short-term decisions.

As I went through the leadership vs. enterprise decision-making process, I ended up focusing on two areas:

- How I wanted to spend my time
- What I wanted to be known for

Here's a simple breakdown of the two routes:

Enterprise Sales

Where I'd spend my time:

Mostly with customers, including significant travel to customer locations

Main skills I'd develop:

Become an expert in specific industries, personas, and sales process

The legacy I'd work to achieve:

Be known as the rep that closes the biggest, most valuable deals

Sales leadership

Where I'd spend my time:

Hiring, developing reps, and improving internal processes

Main skills I'd develop:

Recruiting, coaching, and change management

The legacy I'd work to achieve:

Be known as a leader that helps others achieve career success

After building this breakdown, I gravitated toward leadership. However, I still didn't want to be a Team Lead, which was the next step in my career if I selected leadership.

The Team Lead role at my company was brutal: I'd have to carry a personal quota of a mid-senior rep while managing a team – two full-time jobs for the compensation of one.

I'd work more and get paid less in this role than in an enterprise AE role. My strong short-term preference was taking the AE role, despite the above analysis of time, skills, and legacy.

The question that tilted the scales was, "What do I want to be doing in twenty years?"

I didn't want to be running demos, planning accounts, and chasing down deals.

I did want to lead large sales orgs and shape companies GTM direction. Knowing where I wanted to be long-term pushed me to do something I didn't want to do in the short-term.

Sometimes, thinking less about "what do I want to do in the next two years" and more about "what do I want to be doing in twenty years" can help us make better short-term decisions.

Wrap-up

I don't consider myself to be very wise, but I do have the benefit of experience. I'll conclude my Frameworks with seven points I wish I would have known years ago:

1) No such thing as a "must win" deal

I've lost sleep over dozens of deals that I no longer remember. Win or lose, life goes on.

2) Success is measured in years, not quarters

Zoom out and play the long game. Most top performers have a period of struggle in their careers - keep going.

3) Worry more about the buyer process than your sales process

I lost a lot of deals trying to force buyers through an evaluation process that ignored where they were at in their journey.

4) You'll get ghosted no matter how well you sell

You can reduce it but you can't eliminate it. Don't take it personally.

5) $50k-$100k isn't expensive.

It's probably less than the economic buyer pays for their yearly mortgage. It's not that much money for a business.

6) Comparison is the thief of productivity

The time you spend tracking someone else's success is time you aren't creating your own.

7) No one will care more about your career than you

No one is coming to save you. You have to take ownership of your progression.

Thank you for investing your time and money into this resource. There's a lot of "noise" in the sales advice space, and I'm grateful you trusted me.

To your success!