

DISCOVERY & DEAL PROGRESSION: THE BASICS

Becoming an AE:
Progression & Upskilling
for SDRs

Live session starts at
8am PT | 11am ET | 4pm UK



CHAT BOX

How did your curiosity go?
What did you find out?



CHAT BOX

How did your curiosity go?
What did you find out?

LEARNING OUTCOMES



BY THE END OF TODAY'S CLASS, YOU WILL BE ABLE TO:

- 1. **Explore the basics of deal progression**
- 2. **Establish how to undertake excellent discovery**
- 3. **Understand how and when to qualify out**



LEARNING OUTCOME 1

Explore the basics
of deal progression

WHY DEALS ARE WON AND LOST



LOOK AT 10 CLOSED
WON DEALS

LOOK AT 10 CLOSED
LOST DEALS

INSIGHTS

SALES PROCESS



INTEREST - WORTHY OF A
NEXT CONVERSATION/DEMO

STAGE 1



CONSIDERATION
YOU KNOW YOUR SOLUTION
CAN SOLVE BUSINESS PAIN.
TIMELINE & PATH FORWARD
MAY NEED CLARIFYING

STAGE 2



DEVELOP / EVALUATION
ACTIVELY EVALUATING:
GETTING BUDGET
ALLOCATED, ALL
STAKEHOLDERS
IDENTIFIED/ENGAGED

STAGE 3



SELECTION
ACKNOWLEDGMENT FROM
THE PROSPECT THAT YOU
OFFER THE RIGHT SOLUTION
AND THERE'S AN AGREED
PATH TO PURCHASE

STAGE 4



NEGOTIATION
CONTRACT REVIEWING
(OFTEN GOES STRAIGHT TO
CLOSE)

STAGE 5



COMMITTED
AWAITING SIGNATURE
/ SIGN OFF

STAGE 6

THINKING LIKE AN AE



Find out what deal management process your company is using



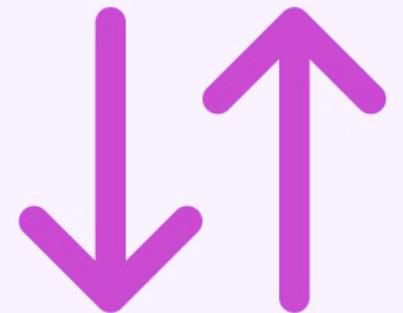
Examine your own CRM for clues



Look at other information available to you



Make friends with your AEs!



"How do you know if a deal is likely to progress?" Rank these in order of biggest red flag to smallest concern to your deal's progression (1 = biggest concern, 4 = smallest concern)!

- ① Start presenting to display the poll results on this slide.



LEARNING OUTCOME 2

Establish ways to
develop skills for
discovery

PITCHING TOO SOON



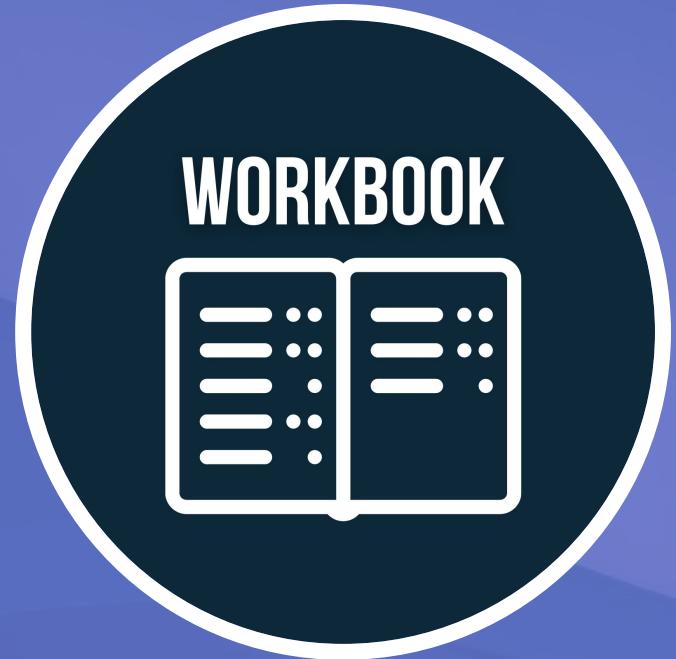
DON'T PITCH, IT'S NOT ABOUT YOU!



**USE 'AWAY-BASED'
MESSAGING**

**"How might your workload
change if we could solve that
problem for you?"**

**"If that was no longer a
problem, what impact would
that have on your team's
performance?"**



REFLECTION

Establish ways to develop skills for discovery



3 things I could read/watch/listen to to start getting a good understanding of discovery



2 things I want to find out about discovery (in my organization or in general)



1 thing I will do this week to develop my skills in this area



LEARNING OUTCOME 3

Understand how and
when to qualify out

WHEN TO QUALIFY IN/OUT



“Knowing when **to qualify out is almost as important as when **to qualify in**.”**

UNDERSTANDING HOW AND WHEN TO QUALIFY OUT: AN EXAMPLE



OUTBOUND CALL SUMMARY NOTES:

- Reveal a relevant pain point
- Aligns to key initiative
- Asked “how do you compare to [competitor]?”

WHAT'S YOUR GUT FEELING?



PROSPECT'S RESPONSE TO EMAIL WITH FURTHER INFO:

“I used [competitor] in the past & loved it.”

“I just joined my company and want to have similar tech as I had in the old company!”

WHAT ELSE DO YOU WANT
TO FIND OUT?

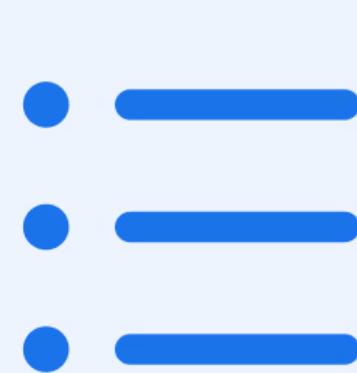


FOLLOWING DISCO CALL, YOU SEND AN EMAIL TO SUMMARIZE POINTS. PROSPECT REPLIES:

“Thanks for this. We have a demo lined up with [competitor they had used previously].”

We'll evaluate the two solutions head-to-head and get back to you.”

FINAL DECISION: IN OR OUT?



**Do you want to spend more time here
and qualify in, or spend time
elsewhere and qualify out?**

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Introductions



Touch point 1: Discuss - Good or bad feeling?



Touch point 2: Discuss - What further information do you want to find out?



Touch point 3: Discuss - In or out?

BREAKOUT ROOM ACTIVITY



Task 1:
Introductions

BREAKOUT ROOM ACTIVITY



INBOUND EMAIL FROM PROSPECT

Hey,

We spoke 9 months ago and your product wasn't quite right then.

Can we now book a demo?

Thanks

WHAT'S YOUR GUT FEELING?



YOU CALL THE PROSPECT

You: Curious, why now? What's changed for you?

Prospect: We've always liked what you do!

WHAT ELSE DO YOU WANT TO FIND OUT?



YOU CALL THE PROSPECT

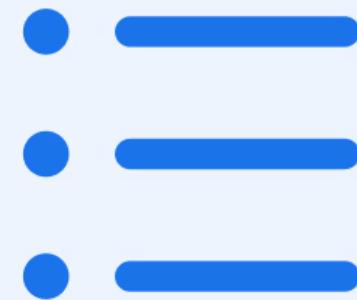
You: Who would sign the deal?

Prospect: My boss

You: Great, can we add them to our meeting next time or speak to them directly?

Prospect: They will trust my decision. You don't need to speak with them.

FINAL DECISION: IN OR OUT?



Qualify In or Qualify Out?

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BREAKOUT ROOM ACTIVITY: FEEDBACK



INBOUND EMAIL FROM PROSPECT

Hey,

We spoke 9 months ago and your product wasn't quite right then.

Can we now book a demo?

Thanks

WHAT WAS YOUR GUT FEELING?



YOU CALL THE PROSPECT

You: Curious, why now? What's changed for you?

Prospect: We've always liked what you do!

WHAT ELSE DID YOU WANT TO FIND OUT?



YOU CALL THE PROSPECT

You: Who would sign the deal?

Prospect: My boss

You: Great, can we add them to our meeting next time or speak to them directly?

Prospect: They will trust my decision. You don't need to speak with them.

**REFLECT ON THE VOTE:
IN OR OUT?**

LEARNING OUTCOMES



IN TODAY'S CLASS YOU HAVE LEARNED TO...

- 1. Explore the basics of deal progression
- 2. Establish how to undertake excellent discovery
- 3. Understand how and when to qualify out



GIVE IT A GO

- ✓ Review some of the prospects you've spoken to recently.
- ✓ Do you have any feelings about whether they'd have converted or not?
- ✓ Then speak to the AEs and follow up on the deals you pushed through last month - did they convert to demos / sales?



Q&A