

Phase	Task	Marketing	SDR	Account Executive	Sales Engineering	Solution Delivery	Notes
	Get Inbound Leads	R, A					
Awareness	Get Outbound Leads	R, A	R	R			
	Lead Qualification - Budget available - Key people	A	R	C, I			
	Turn Over Leads	A	R	C, I			
	Lead Qualification Verification - Budget Available? - Dealbreakers - Competitors - Financial indicators	C		R, A	C		
	First Sales Call - See lead qualification - Present value proposition - Understand customer needs - Deliver standard demo - Gather basic technical requirements			R, A	C		
	Develop account plan - Research company and industry	C		R, A	C		
Discovery	Optional: Idea Generation Workshop			C	R, A		
	Optional: Set initial use case review call			R, A	C		
	Optional: Use Case Qualification			C	R, A	C	
	Set follow-up discovery call			R, A	C		
	Discovery Call - Scoping questions - Process mapping - Demo from customer - Outlining requirements (both) - Timing requirements - Throughput requirements			I	R, A		
	ROI Analysis			R, A	C	C	
	Optional: Technical Review			I	R, A	C	SE review process with product and engineering where necessary
	Pricing			R, A	C	C	
	Discovery follow-up clarifications			I	R, A		
	Optional: Manage IT Security Review			R, A	C		
Selling	Define scope of tailored demo			I	R, A	I	
	Define success criteria for tailored demo			I	R, A	I	
	Deliver tailored demo			I	R, A	I	
	Write SOW			I	R, A	C	
	Approve SOW			C	C	R, A	
	Negotiate pricing			R, A	C	C	
	Manage SOW follow-up			R, A	I	I	
Agreement	Answer technical questions			I	R, A		
	Optional: Decision-maker demo			C	R, A		
Closed	Handoff to Solution Delivery			I	R	A	