

Sales Team FAQ

Practical answers to everyday questions about qualification, pricing, proposals, forecasting, and handoffs.

1) Qualification & Discovery

What qualification framework should I use?

We recommend MEDDICC for complex deals and a light BANT for smaller transactions. Capture at least the economic buyer, pain points, timeline, and success criteria in your notes.

What core discovery questions should I always ask?

Ask about current state, desired outcomes, constraints (budget, security, procurement), stakeholders, and implementation timeline. End with: "If we met your goals, what would success look like in 90 days?"

How do I avoid single-threaded deals?

Map the buying committee early. Identify a technical evaluator, an economic buyer, and a champion. Secure a next meeting with at least two stakeholders each time.

2) Pricing & Commercials

How do I talk about price before value is established?

Anchor on outcomes first. Use ranges, not absolutes: "Similar customers land between X and Y depending on seats and scope." Then pivot to ROI drivers (savings, productivity, risk).

What is our discount policy in plain English?

Start from list, discount for volume/term, and tie any concession to a mutual close plan (e.g., multi-year, reference, case study). Never discount without a give-get.

How do I handle procurement asking for 'best and final'?

Confirm the business case, restate mutual value, and present a packaged offer with a clear expiry aligned to your close date. Escalate only with new scope or reference commitments.

3) Proposals & Mutual Close Plans

What should a winning proposal include?

Executive summary tied to outcomes, solution overview, scope & assumptions, pricing & terms, implementation plan, and measurable success criteria. Keep it skimmable.

What is a mutual close plan and when do I use it?

A shared checklist with the buyer covering legal, security, approvals, and deployment milestones. Use it from the moment the customer agrees to evaluate.

How do I accelerate legal and security reviews?

Provide standard docs upfront (MSA, DPA, security overview). Pre-book review calls and agree on a target signature date with all owners.

4) Objection Handling

How do I respond to 'We don't have budget'?

Acknowledge, then reframe to ROI. Quantify value with a simple model (hours saved x hourly cost, or revenue lift x margin). Offer phased scope or a pilot tied to success metrics.

What if a competitor undercuts the price?

Differentiate on outcomes, risk reduction, and total cost of ownership. Ask what the competitor removed to reach that price. Use references and proof points, not FUD.

How do I handle 'We'll revisit next quarter'?

Identify the real blocker (budget cycle, resource constraints). Propose a dated re-engagement plus a light pilot or workshop that keeps momentum.

5) Forecasting & Pipeline Hygiene

What makes a deal 'commit' vs 'best case'?

'Commit' requires executive alignment, confirmed business case, agreed timeline, and identified paper process with owners. 'Best case' lacks one of those elements.

How should I update next steps?

Every opportunity needs a dated next step with owner and outcome (e.g., 'Legal redlines reviewed with ACME by Oct 15 – Legal (buyer) & AE (you)').

How do I keep my pipeline credible?

Close lost early when true. Trim zombie opps. Calendar recurring hygiene: update stage, next step, and amount weekly before your 1:1.

6) Legal, Security & Procurement

What documents are typically requested?

Master Service Agreement (MSA), Order Form, Data Processing Agreement (DPA), security overview, and sometimes a SOC 2 or ISO 27001 summary.

How do I handle security questionnaires efficiently?

Offer a standard security pack first. If a custom questionnaire is required, schedule a live review with our security contact to speed up clarifications.

When should I loop in legal and security?

As soon as a mutual close plan is agreed. Pre-align on redline boundaries and fallback positions to avoid last-minute surprises.

7) Hand-offs: SEs, Implementation & Customer Success

When do I involve a Sales Engineer (SE)?

Early for complex requirements, integrations, or performance concerns. Share discovery notes and success criteria before the call.

What does a clean handoff to Implementation look like?

Document scope, assumptions, timeline, key contacts, and risks. Confirm kickoff date and who signs off on success criteria.

How do I set Customer Success up for renewal?

Capture desired outcomes and adoption plan in the order form. Introduce CS before signature with a 15-minute expectations call.

8) Renewals, Expansions & References

How early should we start renewal conversations?

At least 120 days before end of term. Review adoption metrics and value realized. Identify upsell opportunities that align with the customer's roadmap.

How do we ask for a reference or case study?

Tie the ask to achieved outcomes and offer value in return (discount on expansion, co-marketing reach). Secure written approval for quotes.

What signals indicate a healthy expansion opportunity?

Multiple teams asking for access, requests for admin features, or evidence of business processes becoming dependent on our solution.

9) Productivity & Communication

What does good sales email etiquette look like?

Clear subject, 3–5 sentence body, one ask, and a proposed time slot. Avoid attachments when links suffice. Confirm the agenda 24h before calls.

How should I run a discovery call?

Open with outcomes, confirm agenda, ask layered questions, summarize findings, and secure the next step on the call. Send a same-day recap.

What is the minimum weekly cadence for a healthy funnel?

New pipeline sourced, stage progression on active deals, and one executive alignment touch per top opportunity.

10) Metrics & KPIs

Which KPIs matter most for individual sellers?

New pipeline created, pipeline coverage ($\geq 3x$ quota), stage conversion rates, average sales cycle, win rate, and time-to-first-meeting.

How do I self-diagnose a slow quarter?

Check top-of-funnel (meetings set), mid-funnel (stalled at legal/security), and late stage (exec alignment). Fix the first broken link first.

What simple ROI model can I use on a call?

Revenue lift: (baseline revenue \times expected % lift \times margin) – cost. Productivity: (hours saved \times fully-loaded hourly rate) – cost.

Tip: Keep deals multi-threaded, keep next steps dated, and tie every concession to a mutual close plan.