

# 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 MEDDIC 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 & Commercial

### *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 ( $\geq 3\times$  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.