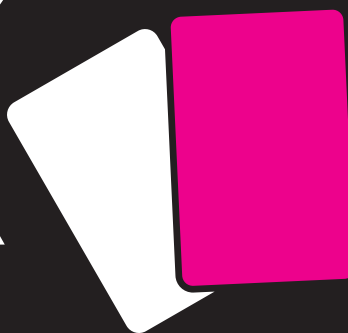


DISCO DECK



THE GOOD PRACTICE BOOKLET



WELCOME TO THE DIGITAL ASSET OF YOUR DISCO DECK!

Here you will find additional frameworks, methods
and general good practices on your journey to
unleash your PreSales power.

- They are in no particular order, just jump into the section
that is most impactful to you.

Enjoy and happy learning.

Thanks a lot for your support.

Tim & Jan

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DISCOVERY WITH PURPOSE

1

"Hey, can you do a demo on Tuesday?"

Our most hated words working in PreSales, especially if the request comes out of the blue. Being abused as the demo monkey, giving harbor cruise demos all day is not only belittling but also of no value to anyone. But let's show some empathy: For Sellers or SDRs, scheduling a demo with a prospect is a WIN. The prospect has agreed to spend considerably more time with us. This could move the deal forward and bring us one step closer to a sale. For some roles, scheduling these types of meetings is even part of their incentive scheme. So we need to be careful not to judge too early.

Rightfully, you smell a "BUT" lurking around the corner. How much insight is your prospect going to gain, looking at a generic demo flow? How are you going to differentiate yourself from your competition? Are you triggering an urgency to act, when only one use case out of 20 is hitting home hard with your prospect? This is what we call the feature function shotgun-approach.

The flipside is: buyers expect to see something! Potentially they have even clicked a "Request a Demo" button on your website. They don't want to spend hours with different people on calls and be interrogated. They value their time and rightfully so. Now, here comes the trick. Before engaging in discovery, you need to sell discovery to your prospect (and sometimes also internally to your colleagues).

"I could show you literally hundreds of things in our software. But I want to be respectful of your time. Would you mind exploring your unique situation before jumping into a demo?"

Nevertheless, a discovery should not feel like an interrogation, but rather a conversation. By asking follow-up questions to the individual responses, you make your prospect feel heard. This is the time to show empathy and provoke a different way of thinking. Not by pitching but instead by asking questions and providing a perspective that may be new to your prospect. That guides them to a potentially more desirable future. This way, the discovery process will become a meaningful and valuable experience, without even showing a single screen of your software. This newly gathered information will enable you to perform much more relevant, impactful and differentiated demos afterwards.

Disco-Demo: This is when you squeeze discovery and demo into a single meeting. Some people are fans, some think it's just a demo with a different label. We believe there is no one-size-fits-all for SaaS. It just depends on the complexity of your portfolio, platform, use cases and industry. But beware: Presenting software can easily lead down the path of feature function discussions. This makes you very comparable and shifts the focus away from the business problem. So handle it with care.

Important Clarification: Sales qualification and discovery are both mandatory, but they are distinct!

Qualification: Do I have a deal? Is this worth spending my time on? Am I able to sell this opportunity to our internal organization to give me the required resources I need to close this?

Discovery: I am convinced we have a realistic chance to close a deal. Now let me truly understand the different pain points, stakeholders, requirements and vision, so I can create a tailored value proposition for my prospect.

BUYING IS HARD

2

Selling is hard, buying is harder. Not only does this roll right off your tongue, it's also a book [hat tip Garin Hess]. But most importantly, it's the truth! For us in sales, there are two major challenges we should keep in mind:

#1 - Decisions are made by teams

Put yourself in the position of a B2B decision-maker. For the sake of argument, let's look at a CRM software purchase. There are 500 people working in your sales organization. You have an existing IT stack. The strategy is to move from on-premise to cloud. WOW, where do you even start? There are hundreds of CRM providers. And this is a multi-million-dollar project. Do you want sole responsibility for that decision? To risk your job, reputation, and personal brand?

According to Gartner, an average of 11 individual stakeholders are involved in a B2B purchase. That number can occasionally flex up to 20. These are the 20 people who decide whether a purchase is made in the first place and, if so, which vendor it's going to be.

Our challenge in sales: these are 20 individuals, with different needs, goals, and ambitions. Asking the right questions will help you to **1)** understand and **2)** address those properly.

#2 - You are the last one to hear about it

Gartner reports that 33% of all buyers desire a seller-free sales experience, a preference that climbs to 44% for millennials. As millennials mature into key decision-making positions, a digital-first buying posture will become the norm. As face-to-face interactions with customers decline, suppliers still need to find ways to influence buying decisions. Gartner and Forrester state that B2B buyers are already 70% of the way through the buying process before the first meeting with any external sales representative.

In other words, when companies consider a purchase, you in sales are the last one to hear about it. With so much information available to potential buyers, it raises the question: What is the purpose of sales? The answer is that sales should shift away from being the source of information to increasing a buyer's confidence. Sales can provide value by being "sense makers" who help customers understand everything they're learning.

So how do you guide buyers to help them understand and make sense of everything? Ha! That's the million dollar question. The answer is to ask the right questions. Questions that provide new perspectives, establish new perceptions and create awareness of a problem.

SELLING WITH A SPIN

3

In his 1988 book *SPIN Selling*, Neil Rackham argues that sales must abandon traditional techniques and build value as trusted advisors to win larger, consultative deals. With this goal in mind, it becomes relevant to not only sales but also PreSales. Three key takeaways from the book include:

Three key take-away from the book include:

1. Closing is less important than most sellers think
2. Questioning is more important than most sellers think
3. High closing rates are associated with asking the same types of questions

The question types outlined in SPIN sales methodology are (in this order): **Situation, Problem, Implication, Need-Payoff**. Each question type plays a different role in moving the buyer toward the purchase. Here is what they mean:

Situation | Situation questions such as „How is this process currently executed?“ function as a way to gather information. Use Situation questions to learn where your prospects stand – from their processes and pain points to competitive plans and results. The specific questions will depend on your product or service. Stay away from fact-gathering questions like “How big is your company?” or “How many locations do you have?” Research those key details about your prospect online beforehand rather than wasting their (and your) time on a call.

Problem | Problem questions such as „Does this process ever fail?“ function as a way to identify the pain points and problems prospects experience. In this stage, you identify potential areas of opportunity. What gap isn't being filled? Where is your prospect dissatisfied? They may be unaware they have a problem, so delve into the common places your solution adds value. Examples: “How long does this take today?”, “How many people are required to achieve the necessary results?” or “What is not working as intended?”

Implication | Implication questions help you underscore why those pain points need to be solved. Once you've identified an issue, figure out how serious it is. Implication questions reveal the depth and magnitude of your prospect's pain point – simultaneously giving you valuable information for customizing your message and instilling urgency in the buyer. This will make them develop a new appreciation for the problem by the time you've finished this part of the conversation. Example: “If you didn't experience [issue], how much easier would it be to achieve [primary objective]?”

Need-Payoff | Need-Payoff questions lead the prospect to draw conclusions on their own rather than leading into a pitch right away. Need-Payoff questions encourage the prospect to explain your product's benefits in their own words, which is far more persuasive than listening to you describe those benefits. You're essentially asking questions that surface your offering's potential to help with their core needs and problems. These questions focus on the value, importance, or utility of the solution. Example: “Would redirecting effort from [process X] into [process Y] drive [business outcome]?” Beware: If they're too obvious, you might come across as condescending.

OPEN AND CLOSED QUESTIONS

4

The way you ask a question can often influence the quality of the response. Therefore you should put some thought into the questions you are going to ask. Especially for open-ended questions.

Open-ended questions:

Open-ended questions are questions where the respondent can give a free response. Some characteristics of open-ended questions are:

They usually involve the Five W's: Who, What, When, Where and Why. And also How!

They are there to drive a conversation and create dialogue. To have the respondent share as much relevant detail as possible.

You need to invest time to prepare powerful open-ended questions. Well lucky you, since you have this deck as a little shortcut. :-)

They normally require thought before someone answers. Which means you need to give them time to answer as well. So, welcome the silence in conversations. You will be surprised how long ten seconds feels in those situations.

Open-ended questions, aligned with the person you meet, will lead you to motivations and uncover information that will help you to prepare a more convincing pitch.

Closed-ended questions:

Closed-ended can be answered „yes“ or „no“, or have a limited number of possible answers (e.g., A, B, C or all of the above).

There are two good reasons to ask a closed-ended question in a discovery conversation:

1. If you want someone else to commit / confirm. Examples:

- a) *“Do you agree on the proposed timeline?”*
- b) *“Do you think I have summarized this correctly?”*

2. If you are asking for facts or quantitative parameters such as numbers, KPI, names, ratings on a scale, etc. Examples:

- a) *“What was your NPS in 2021?”*
- b) *“On a scale of 1-10: How satisfied are you with your current solution?”*
- c) *“On a scale of 1-10: Where are you with your digital transformation?”*

OPEN UNTIL CLOSED - QUESTIONS

4

Let's talk about scaling questions

As part of closed-ended questions, you can leverage scaling questions for your conversations as you can see in the examples above.

Scaling questions can make it easier to get answers. You can easily quantify, rate, or identify importance by using scaling questions.

Based on the answer, you can now understand where they would like to be in the future. Let's assume you get a 5 regarding your question about digital transformation. Now ask "Okay, got it. And where would you like to be in about 6 months (or whatever time frame makes sense)? Again on a scale of 1-10."

It will quickly become clear where they stand today and where they want to be going forward. Then you can easily drill into the most important areas and discover more relevant information.

Turn closed-ended into open-ended questions

Keep in mind that most closed-ended questions can easily be turned into open-ended questions. Here is an example:

Closed-ended	Open-ended
Do you have any other questions?	What other questions do you have?
In most cases, you will get a NO and move on to the next topic.	This opens the door for a broader conversation. You can add the name of the specific person you are asking to make it more personal and/or add more context. Example: "Tim, what other questions do you have regarding the integration scenarios?"

The worst version of this question would be: "If there are no other questions, (I will continue my...)". That way, you really just show that you are not interested.

OPEN UNTIL CLOSED - QUESTIONS

4

Do you want more examples?

You're welcome:

Closed-ended	Open-ended
Hey, Tim, are you well?	Hey, Tim, how are you doing today?"
Did you do your exercises this week?	What exercises did you do this week?
On a scale of 1-10: How satisfied are you with your current solution?	Why are you satisfied with your current solution?
Are you happy with your experience with us?	How would you describe your experience with us?
Was this valuable for you?	How was this of value to you?
How likely are you to recommend our product?	What are your reasons for choosing our product?

Try to limit the use of closed-ended questions.

Add **which, how, what or who** at the beginning.

Attention:

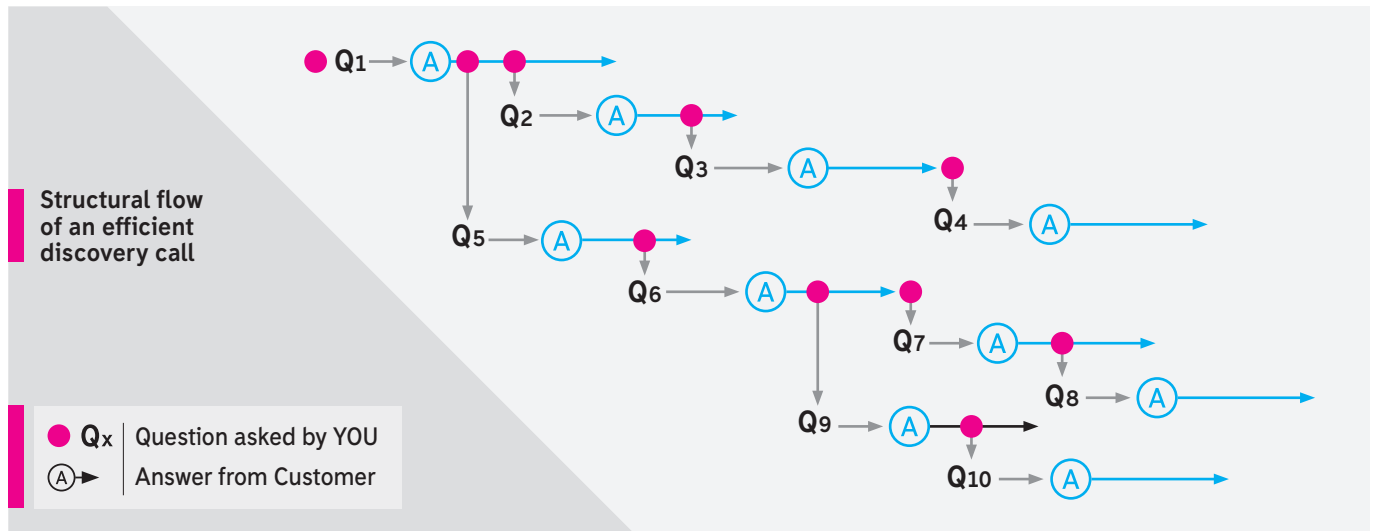
You want to have your conversation partner talking **substantially** more (> 50%) than you on a discovery call.

I LIKE MY QUESTIONS LIKE MY CAKE: LAYERED



5

Don't make your qualification or discovery an interrogation or interview! Make it a curious conversation that mutually benefits the person you are talking to as well as yourself. Try to use the answers you get to dig deeper into a topic and uncover the real needs and motives of your prospect to then provide the best possible solution.



Here is a simple example:

We've kept it simple to convey the concept of asking a follow-up question that builds on the previous response. The example below sounds a bit like an interrogation but in reality, of course, it would be more conversational:

- **What is your most important goal?**
Transparency
- **Why (for what) do you need transparency?**
To understand where our sales time is spent today
- **Why is that understanding important/crucial to you?**
To work in the most efficient and productive way as a sales organization
- **What is holding your team back from being efficient and productive today?**
A lot of it is related to siloed data and multiple communication channels
- **Which of these do you need to streamline?**
A user needs to access account, contact, activity, and billing data in a combined way.
This should include touch points via phone or email marketing forms.
- **How would you then measure productivity based on these guidelines?**
We want to be able to free up 15% more time for each of our resources.
- **Let me quickly summarize: you want to free up at least 15% more time for your sales org by streamlining data sources and channels – being able to make this transparent is crucial to you?**
Yes

I LIKE MY QUESTIONS LIKE MY CAKE: LAYERED

5

In this example, mostly open-ended questions are used out of curiosity and ensure that the prospect is sharing the most relevant details.

This way, you will be able to discover many more insights and take your understanding of their business to the next level. With that kind of information, you will be able to build a better and more competitive story / demo / proposal.

After a while, you will reach a point where it becomes necessary to get a clear confirmation. For this purpose, you use a closed-ended question, finally!

Let's imagine you stop after the first question. Your demo might look like a wild and colorful dashboard without any meaning to your audience. Not great, is it?

Instead, using a series of questions, you'd be able to dig deeper into the layers right away, or even discover additional areas.

It looks easy, but it's not. You need to practice this a lot to make it become part of your discovery DNA.

We promise: your investment is worth it!

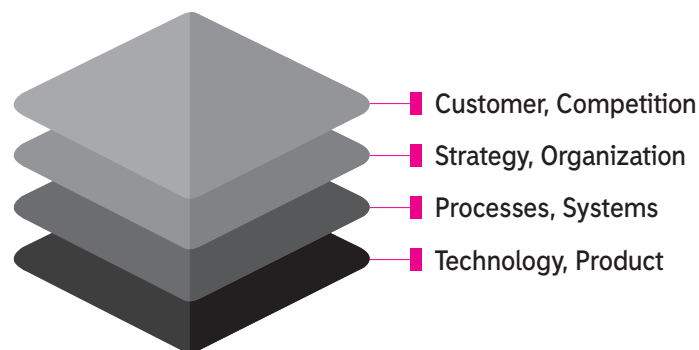
FROM BYTES TO BUSINESS

6

Discovery is ideally an iterative process that starts at the very beginning of a sales cycle and is really only completed (at least from a sales point of view) when a contract has been signed. It is advisable to approach discovery in a multi-layered way. Let's start at the very bottom, the technical layer.

Technology & Product: Most sales engineers feel very comfortable here, so this is often done well. Maybe even too well, in the sense that the focus is solely on the use cases and technical requirements and product features. Yes this is important, but does this truly make such a big difference in the broader company context? Let's move one layer up.

Processes & Systems: Processes and systems are also mostly part of the discovery conversation: How does this process work today? Which departments are involved? How does the data flow and which IT systems are used? Now with the first two layers covered, we have a good foundation. But, by all means, do not stop here. The really juicy bits are yet to come.



Strategy & Organization: Please read the next sentence twice. The primary goal of discovery is to understand how we can make our prospect even more successful. Here it helps to think more broadly. Let's grasp the company's vision and mission as well as its strategy and organizational structures. Where will this company be five years from now? Who is really in charge? What is this company's purpose?

Customers & Competition: Now it's time to look outwards. Here, you should ask yourself in which markets your prospect operates. Who is the competition? Who are their customers? What are the major challenges in the industry? How does their business model work? Are they being disrupted or are they disrupting? Where do their services and products lie in the hype cycle? Is the market slimming or growing? What challenges typically come with that?

Understanding this, and having the ability to articulate the value proposition of your software solution to the prospect in the context of all of these layers, will guarantee that decision-makers throughout the hierarchy are receptive.

Hot Tip: The more discovery moves from the technical layer to the market levels, the less dependency you have on direct contact with a stakeholder to find answers. Instead, public information about the prospect will become useful. Websites, quarterly filings, financial and analyst reports, or even a simple search for the latest news about the prospect are great places to start to understand the bigger picture.

THE PERFECT PROSPECT

7

Important Note: This method/tool is very powerful for selling successfully and we highly recommend you use it as early as possible during your qualification process. It will not only save you a lot of time but also help you focus on the prospects who are most likely to convert.

What is an Ideal Customer Profile?

An ideal customer profile (ICP) is defined as the type of company that would benefit the most from your product or service. Companies that fit your ICP are the most likely to buy and continue to use your product, making them extremely important for business growth.

Ideally, you also add buying personas to your ICP, meaning you include a breakdown of the typical roles that have an interest in the type of solution you are selling.

How to define an Ideal Customer Profile?

To define your ICP you can use multiple characteristics such as:

Industry (vertical breakdown)

Geography

Company Size (revenue, # of employees, # of offices, etc.)

Customer base of your prospect

Minimum # of users (or a similar measurement)

Maturity level of XYZ (e.g., organizational or technological)

Legal & Compliance

Once you have defined the aspects above, it will be much easier for you to qualify a fit in the first step. Now, if you want to take it to the next level, you should definitely consider the following:

Pain points / challenges you address

Benefits you deliver

Business objectives / goals

These aspects can also be used to map out your buying personas. Ideally, you define the ICP as a joint effort between marketing and sales (i.e. Go-To-Market). It could be the case that you will have more than just one ICP because of different regions or segments, etc.

THE PERFECT PROSPECT

7

Adjusting your ICP should be a continuous process to make it even more accurate over time. Use your CRM data and interview your existing customers to achieve this.

Here is a simple example of an Ideal Customer Profile for a fictional and specialized CRM company:

Criteria	Value
Industry / Vertical	Automotive supplier
Location / Geography	HQ located in Germany
Company size	At a minimum 1,000 employees and > 1 billion in annual revenue
Customer base of your prospect	Major car manufacturer
Minimum # of users	150
Maturity level	Early stages of sales digitalization, typically using Excel today with a strong desire and urgency to transform and digitalize.
Legal & Compliance	Concerned about data usage outside EU
General pain points	Time to offer Time to contract Siloed data Business decisions based on gut feeling
Business goals	Create diversified portfolio to grow and be competitive Digitalize business & offerings Simplify buying overall process ...
Benefits you deliver	Shorten time to offer and contract by 30% on average Streamline data sources to apply a true single source of truth Lower TCO up to 15% Hosting and support inside the EU ...
Additional criteria	Companies with focus on eMobility and sustainability

RESEARCH LIKE A SCIENTIST

8

Gartner and Forrester state that 70% of the buying journey has already taken place before prospects actively reach out to vendors. Now put yourself in the shoes of such a well-informed prospect. You go into the first call with Vendor 1 out of the 5 that made the shortlist. And now the seller is starting from scratch: "How many employees do you have?" or "What regions are you active in?"

You immediately start to get annoyed. You came on this call to learn something to help you make a decision. But you are being interrogated with questions that are public knowledge. What a waste of time! And this is only the first vendor call out of the five you have set up for today. Oh boy...

By now, the point is hopefully clear. Especially with inbound leads, which have a higher intention to buy, your prospects have done their homework. And so should you.

Here is a **checklist** of things you can do, without ever speaking to your prospect to learn more about their situation and challenges:

✓ Checklist

- ☐ Visit your prospect's website to learn about:
 - ☐ The products/services they offer
 - ☐ What type of customers they serve
 - ☐ Their mission and vision
 - ☐ The leadership or founder team
 - ☐ News or announcements
 - ☐ Recruiting and open positions they are hiring for
 - ☐ If possible: interact with their Go-To-Market:
 - ☐ Marketing: YouTube, podcasts, LinkedIn
 - ☐ Download a white paper, purchase a sample
 - ☐ If possible: learn about their process – deal with them:
 - ☐ Make a purchase in their webshopp
 - ☐ Contact Support – call them – open a ticket
- ☐ Do a Google Search on your prospect to learn about:
 - ☐ Their competition
 - ☐ Recent news
 - ☐ The market environment
- ☐ Read the latest annual/quarterly report to uncover:
 - ☐ Financial standings
 - ☐ Business challenges that executives care about
 - ☐ Key programs with strategic intent
 - ☐ If they are listed: check out the stock
- ☐ Use (paid) company databases to discover multiple areas of information around your prospect
- ☐ Learn about the people you are about to have a call with:
 - ☐ Titles, roles, responsibilities
 - ☐ LinkedIn / other social media
 - ☐ Do you have any commonalities with them?
- ☐ Internal facing:
 - ☐ Check out the CRM entries on your prospect
 - ☐ Align with your team on a call before speaking to your prospect
 - ☐ Listen to recorded calls (2x speed to save time) / read notes

ACTIVE LISTENING BUILDS TRUST

9

Zig Ziglar once said, "You will get all you want in life if you help enough other people get what they want."

Active listening refers to a way of listening that connects you in a positive way with the person you are talking to. It's the process of listening attentively while someone else is speaking, paraphrasing, and reflecting back what they have said, and holding back on judgments and advice. Too easily we fall into the trap of having to relate immediately with our own experiences and what we have learned previously. This is not the time to do so.

When you practice active listening, you make your conversation partner feel heard and valued. Active listening is therefore the basis of every successful conversation.

It involves more than just hearing someone speak. In active listening, you concentrate fully on what is being said. You "listen" with all your senses and give your full attention to the person who is speaking.

Here are some characteristics of active listening:	What does active listening not mean?
<ul style="list-style-type: none">> Neutral and nonjudgmental> Listen with your eyes> Pay attention to tonality and rate of speaking> Be aware of body language> Patient (hold out silence)> Avoid the temptation to respond with your own experience> Verbal and nonverbal feedback as a sign of listening (e.g. eye contact, mirroring, leaning in)> Ask questions (to verify & clarify)> Reflecting back what is said> Summarize / repeat for understanding> Don't just hear the words, but truly listen for their underlying meaning> Take notes	<ul style="list-style-type: none">> Lack of respect for the speaker> Only pretending to pay attention> Hearing only the surface meaning (not understanding the deeper meaning)> Interrupting> Not making eye contact> Pushing the speaker> Getting distracted> „Topping“ the story (saying „that reminds me of the time...“)> Forgetting what was said in the past> Asking for unimportant details> Focusing too much on details and missing the big picture> Getting stuck in your own head> Ignoring things that you don't understand

REMEMBER:

Qualification and discovery is really the time to pay attention and listen carefully. It's not the time to sell or solve!

ACTIVE LISTENING BUILDS TRUST

9

Here are some tips on **active listening**:

- Turn off your inner dialogue when listening. Avoid daydreaming.
It is impossible to listen carefully to another person and your own inner voice at the same time.
- Be patient while you listen. We can listen much faster than others can speak.
- Rephrase what is being said rather than giving unsolicited advice or opinions.
For example, begin by saying, „In other words, what you are saying is....“.
- Do not interrupt the other person while they are speaking. Do not prepare your response while the other person is speaking; the last thing he or she says may change the meaning of what has already been said.
- Learn to recognize active listening. Watch television interviews and observe if the interviewer is practicing active listening. Learn from the mistakes of others.
- Pay attention not only to what is said but also to nonverbal behavior to detect hidden meanings. Facial expressions, tone of voice, and other behaviors can sometimes tell you more than words alone.
- Make eye contact while your conversation partner is speaking. In general, you should maintain eye contact about 60-70% of the time while listening.
- Show interest by asking questions to clarify what is being said. Ask open-ended questions to encourage the speaker. Avoid closed yes-or-no questions that cause the conversation to stall.
- Don't abruptly change the subject; this gives the impression that you haven't listened to your conversation partner.
- Be open and neutral and hold back on judgments while listening.

NOT ALL BUYERS ARE CREATED EQUAL

10

For this section, we'll use the buying personas described in Miller Heiman's strategic selling methodology. We added a fifth influencer called „The Project Lead“.

Why? Because we like to go one step beyond ;-).

As you will notice, we have included these buying personas on each question card. Not every question is suitable for every stakeholder. The purpose is to give you guidance on the questions to use for different stakeholders.

Please note that this is supposed to align with your prospect's buying process, not your internal sales and marketing process. Is a buyer really saying to themselves: „I'm now a qualified lead, how exciting.“?

Of course not, but they might well say, *„I've researched how to solve my problem, and I think I can clearly articulate what I need.“* Your marketing and sales tactics and content must align with the *buyer's journey* and aim to move the customer from one stage of the buying process to the next.

In the second step, it's not only about asking the right questions to the right people but also developing consistent messaging that aligns with your buyer's journey. Messages should change as a buyer moves through the awareness, consideration, and decision stages.

Let's take a look at the different buying personas.

1. The Economic Buyer

They want: Evaluate ROI (return on investment).

What's important to them: Case studies, customer examples and financial models that show the ROI of a solution.

This buyer is simply in charge and is therefore the most important of the influencers. They are often the most senior people, but not always. They often evaluate the broader business impact of your solution. Will it increase sales or reduce costs, increase profit margins or enable entry into new markets, etc.? You will also evaluate the business risk associated with your solution choice. For example, if your company ceases operations, loses key team members, or is bought out, what impact will that have on the project?

Ask about strategy and demonstrate how your solution will help the business achieve its long-term goals.

2. The User Buyer

They want: Evaluate user experience and operational impact.

What's important to them: Practical aspects of your solution, such as free trials, demonstrations, user documentation, etc.

They are personally connected to your solution and evaluate it based on the impact it will have on their specific job performance. This person needs to know how your solution will be used on a day-to-day basis and who it will affect. They tend to consult with peers in user groups or on community websites to learn what others who have implemented your solution have to say about it. Their research can be extensive and detailed, often focusing on change management. The economic buyer will rarely move on if they get a red light from the user buyer.

You should ask the user buyer questions based on pain points.

3. The Technical Buyer

They want: Evaluate feasibility.

What's important to them: Contract terms, trials, demonstrations, integrations, feature checklists (RFP response) and compliance.

Typically, the technical buyer is the CTO, CFO or IT manager. In evaluating your solution, they'll ask, „Does this mean I'll have more work?“, „Could we develop this ourselves?“ or „There are other, better options, but I don't know about them.“

They can't say „yes,“ but they can say „no.“ There may be more than one technical buyer involved in the sale, for example, both the IT department and the finance department need to sign off on the deal.

4. The Coach

They want: To see **your** solution implemented.

What's important to them: Marketing and sales materials that can be used to promote your offering internally.

The coach is your advocate within the organization – someone who sells your solution when you are not in the room. The coach is different in the sense that often they need to be developed first. No one is going to jump on the first call with you and say: "I dislike all the other vendors, I just want your solution." That's typically a process that takes a bit of time.

Also, it's worth noting that a coach needs to have a good deal of authority to influence and ideally, to make decisions. There is no point in making the janitor a fan of your solution.

5. The Project Lead

They want: Assist the vendor selection in the best possible way.

What's important to them: That you make the process simple and valuable for them.

The project lead is typically the person you have a lot of touch points with throughout the complete sales process. This person may ask for a lot (documents, feedback, offers, etc.) and set timelines you need to hit. Also, the project lead should be able to connect you with other important stakeholders on the customer's side. Prepare your strategy and keep your project lead happy all the time. This role may not have decision-making authority but can be highly influential in all directions.

Please do not overrate this role! Just because this person is typically the most accessible stakeholder and willing to jump on calls with you does not mean they are in favor of your solution. Many opportunities have gone awry because the seller thought the project lead was their coach.

Keep in mind:

Each influencer has their own buying journey and needs different content delivered to them through a variety of tactics that cover their entire buying journey. Once you've created this matrix, you'll have a clear plan for how to support, guide, and sell to each influencer in your complex B2B selling process.

UNCOVER THE TRUTH: 5 X WHY

11

Sakichi Toyoda (founder of Toyota Industries) developed the *Five Whys Technique* in the 1930s to be used as a problem-solving method.

The method is remarkably simple: when a problem occurs, you drill down to its root cause by asking „Why?“ five times. Then, when a countermeasure becomes apparent, you follow it through to prevent the issue from recurring.

The **Five Whys** technique is most effective when the answers come from people who have hands-on experience of the process or problem in question.

Example:

Problem - We did not send the newsletter for the latest software updates on time.

> Why did we not send the newsletter on time?

Updates were not implemented until the deadline.

> Why were the updates not implemented on time?

Because developers were still working on the new features.

> Why were the developers still working on the new features?

One of the new developers did not know the procedures..

> Why was the new developer not familiar with the procedures?

He was not properly trained.

> Why wasn't he properly trained?

Because the CTO believes that new employees don't need thorough training and they should learn on the job. Countermeasure – Ensure that new employees receive adequate training before working in the day-to day operations and check if they are aware of usual procedures.

> What does that mean for sales qualification and discovery?

Is five times a rule set into stone? No, of course it's not. Sometimes you can get a concrete answer after asking two or three times. The point is, very seldom will you get the true underlying reason after asking just once, so dig deeper to find the treasure of truth.

> What will be your outcome?

Clearly, a competitive advantage. A focused, purposeful demo, story, talk track, and customer-centricity.

ABOUT US

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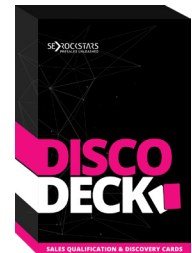
We are Tim and Jan. We both love sales engineering. We've both been in the B2B SaaS industry for over a decade. In 2018, we started our **PreSales-focused podcast** with three main goals:

- > **We want to learn every single day – for life**
- > **We want to share our experience and knowledge to help others**
- > **We want to bring people together as a community**

We've spent a combined total of 20+ years in various SaaS companies such as Seismic, Miro, Salesforce, and SAP and learned the hard way what it takes to do great qualification and discovery.

Attentive listening and **meaningful communication** are key for us.

To help you with your conversations, we've developed the Disco Deck - Sales Qualification & Discovery Cards.



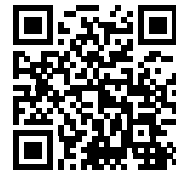
Tim Brömme

- > Bookworm
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DISCO DECK



Sales Qualification & Discovery

**THE GOOD
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