

Sales Stage Management Guide

STAGE 1	STAGE 2	STAGE 3	STAGE 4	STAGE 5
QUALIFY	EDUCATE	VALIDATE	PROPOSE	DECIDE
(Buyer: Initial Interest)	(Buyer: Education)	(Buyer: Transfer of Ownership)	(Buyer: Rationalize)	(Buyer: Decide)
Key Questions				
What is causing you to do something different? Why now?	What are some challenges you're facing over the next 6 months?	What are the top things you need this solution to deliver?	Can you walk me through the internal process for contract review? How long does it take? Who is the actual signer?	Are you familiar with DocuSign?
Can you quantify this need for change?	Assuming you find a solution provider, when would you like to be live?	How does this compare with your current solution?	Does the timeline that we set up still work?	Can I answer any questions for you about the contract?
What are the costs of status quo (what you're currently doing)?	What are you doing to minimize the risks of falling behind competitors?	Are there any remaining questions or concerns with regards to the product?	Are we in agreement that the proposal we sent out works for you?	Who from your team should be on the kick-off call?
Who gives the final signoff on these decisions and what other members of the team are involved?	What is the risk of not doing anything?	Can you walk me through the buying process for your organization?	What day / time works best for a kick-off call once we're all signed off?	
DICTATE NEXT STEPS!	DICTATE NEXT STEPS!	DICTATE NEXT STEPS!	DICTATE NEXT STEPS!	
Activities: Complete Each Activity Before Moving to the Next Buying Stage				
Profile Customer Fit	Confirm Need to Buy	Detailed Demo	Finalize Proposal	Contract Signed
Document MEDDIC in SFDC	Timing / Implementation Date	Buy-in from Decision Maker	Tech Meeting & Sign-Off	Onboarding Discussion Calendared
Schedule Discovery Meeting	Document Buy / Decision Process	Send / Discuss Pricing Options	Contract Sent	CS Handoff
Set and Send Agenda	Competitive Landscape	Complete & Review Timeline	Legal Review	
	Individual / Institutional Wins		Identify Remaining Customer Needs	
Key Gives: Give These to the Customer Before Moving to the Next Buying Stage				
Discovery Call Agenda	Initial Overview	Success Stories	Final Proposal / Contracts	Thank You Note
Company Overview	White Paper / Case Studies	Pricing Options / Proposal	Support & Timetable	CS Contact Intro
Use Case -- DON'T GIVE PRICE	Best Practices	Implementation / Use Plan	Access to CS Contact (if helpful)	Onboarding Date
Key Gets: Get These from the Customer Before Moving to the Next Buying Stage				
MEDDIC	Confirm MEDDIC	Confirm Buy Process	Approval Process	Signed Contract
Org Chart / Access to Power	Big Initiatives	Redline of Implementation Plan	Confirm Final Implementation Plan	Other Opportunities?
Timing / Cause	Implementation Date	Full Access to DMs	Legal Review	
Past / Present / Future Plans	Validate Internal Process		Decision Y / N	
	Agreement to Move Forward		Referrals	