DEAL STRATEGY CHECKLIST

FOR MANAGERS

Before meeting, consult the **TriMetrix**

- Have a **Buyers Grid** out
- Ask: "What's the client's **DISC**?"
- Why did they **agree to meet** with you?
- What was the **goal** of the meeting?
- What was the clients **key business initiative**?
- Did you notice where you **uncovered pain**? If you tried, what were you trying to get the client to feel was a problem?
- Show me the **WITY** - look for detailed notes. Ask questions like: "What did they mean by that?"
- How much did they say that's been **costing them**?
- What was their **dominant buying motive**?
- What was the **objection** when you closed?
- What's the **next step**?
- Who are the other **stakeholders**?
- Any **red flags** or areas we should be considering?
- Is there an **incumbent**?
- What is their **MUST-WIN ISSUE**?

DON'T FORGET

WHAT DID YOU DO WELL AND WHAT COULD YOU DO BETTER NEXT TIME.
(HAVE A PERSONAL EXAMPLE OF BOTH)

YOU CAN DO A LOT OF THINGS RIGHT AND LOSE, YOU CAN DO A LOT OF THINGS WRONG AND WIN.

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