DEAL STRATEGY CHECKLIST FOR MANAGERS

Consult the TriMatrix before meeting

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

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 STILL LOSE, OR DO A LOT OF THINGS WRONG AND STILL WIN!