

Step 2 | 20% (3Ws by Org: Depth for Deal Traction)

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Quick Notes		
Directions	Unit Tests (3Ws/WNs)	Context (Place answers below in blue)
<p><u>Context</u> Fill in high-level answers in the Context column.</p> <p><u>Test answers</u> Ask WN questions, refine context or add WNs to ask as next steps.</p>	<p>Why Buy Anything? <u>Goal: Activation energy</u> I want to understand what is driving your interest to make a change.</p> <p><u>WNs: Why not just do nothing?</u> Is doing nothing an option? What happens if you don't change? Anything?</p>	<p><u>Context</u></p> <p><u>Test context with the 5WNs (i.e., root causes)</u></p> <p><u>Test source (i.e. Prospect or your pitch / assumptions?)</u></p> <p><u>Next Step</u></p>
<p><u>Test source</u> Bring awareness to assumptions or your pitch vs voice of the customer.</p> <p><u>Next Step</u> Brainstorm action you can take to get unknown 3Ws or to test, strengthen and use known 3Ws.</p> <p><u>PRO TIP</u> Your brain melts when it's your deal - review with your team or manager.</p>	<p>Why Buy Us? <u>Goal: Unique value proposition</u> I want to understand your desired outcomes and challenges you've encountered so far getting them.</p> <p><u>WNs: Why not just...</u></p> <ul style="list-style-type: none"> - Do it in house? - Go another route? - What else have you tried? Did it work? Why not? What else? 	<p><u>Context</u></p> <p><u>Test context with the 5WNs (i.e., root causes)</u></p> <p><u>Test source (i.e. Prospect or your pitch / assumptions?)</u></p> <p><u>Next Step</u></p>
	<p>Why Buy Now? <u>Goal: Urgency and timeline</u> I want to understand what is driving your timeline and how it compares with other initiatives priorities.</p> <p><u>WNs: Why not just...</u></p> <ul style="list-style-type: none"> - Wait a year - Or let your timeline slide a month or two? What's the cost? If any... 	<p><u>Context</u></p> <p><u>Test context with the 5WNs (i.e., root causes)</u></p> <p><u>Test source (i.e. Prospect or your pitch / assumptions?)</u></p> <p><u>Next Step</u></p>

Steps 3-4 30-40% (3Ws by Roles: Width and Height for Account Navigation)				
Quick Notes				
Stage + Unit Test	Context <i>Personal and professional alignment</i>	Why buy anything? <i>Why change?</i>	Why buy us? <i>Key outcomes & challenges</i>	Why buy now? <i>Cost of waiting or letting timeline slide</i>
Champion(s) 30% Person(s) that sell on your behalf when you are not there - who can articulate their 3Ws. Who has power or influence. And invested interest in your success. <i>Can be internal or external. The more complex, the more of them you may need.</i>	<u>Champ Name/Title/Team</u> <ul style="list-style-type: none">... <u>Use cases</u> <ul style="list-style-type: none">... <u>Stakeholders & KPI's</u> <ul style="list-style-type: none">... <u>Torpedoes (Villains)</u> <ul style="list-style-type: none">... <u>Competing priorities</u> <ul style="list-style-type: none">... <u>Next Steps</u> <ul style="list-style-type: none">...	<u>Why Buy Anything?</u> <u>Next Steps</u>	<u>Why Buy Us?</u> <u>Next Steps</u>	<u>Why Buy Now?</u> <u>Next Steps</u>
Sponsor(s) 40% Person(s) with overall authority. Owns the budget. Can articulate their 3Ws and ballpark budget. <i>There can be more than one if multiple budget sources. Or multiple layers for larger complex deals.</i>	<u>Sponsor Name/Title/Team</u> <ul style="list-style-type: none">... <u>Budget (amount and org)</u> <ul style="list-style-type: none">... <u>Business Cases</u> <ul style="list-style-type: none">... <u>Competing initiatives, strategies or objectives</u> <ul style="list-style-type: none">... <u>Next Steps</u> <ul style="list-style-type: none">...	<u>Why Buy Anything?</u> <u>Next Steps</u>	<u>Why Buy Us?</u> <u>Next Steps</u>	<u>Why Buy Now?</u> <u>Next Steps</u>
Key Stakeholders As needed* <i>E.g., Legal, Security, Expert, Super User</i> <i>* Explore if you hit issues... this helps you tailor this to your sales situation.</i>	<u>Type of stakeholder(s)</u> <ul style="list-style-type: none">... <u>Role(s)</u> <ul style="list-style-type: none">... <u>Involvement in buying(s)</u> <ul style="list-style-type: none">... <u>Involvement in use(s)</u> <ul style="list-style-type: none">... <u>Next Steps</u> <ul style="list-style-type: none">...	<u>Why Buy Anything?</u> <u>Next Steps</u>	<u>Why Buy Us?</u> <u>Next Steps</u>	<u>Why Buy Now?</u> <u>Next Steps</u>

Step 5 | 50% (Mutual Alignment Plan–M.A.P.)*Tailor the events to your company and each prospect as needed.***Quick notes**
And links shared with prospect

Date	Event	Description Deliverable	Persons Responsible
MM/DD/YY	Discovery	Understand potential alignment and path to success.	[Name], [Title], [Company]
	Demo and use cases	Explore possible use cases, decision criteria, decision process.	
	Business case	Business case showing value of solution and required metrics and their owners.	
	Proof of Concept / Value	Proof of concept and its value.	
	Procurement plan	Shared timeline that includes legal, procurement, handoff, etc. to ensure we stay on track.	

Internal Deal Collaboration and Notes

2023-XX.XX (Day) - Meeting notes title...	4
2023-XX.XX (Day) - Title of email draft that team is working on collaborative...	4
2023-XX.XX (Day) - Archive of 3W's from this date...	4

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