

# DIAGNOSTIC SELLING....



SEASON 4

EPISODE 21

## The 10 Things You're NOT Looking For in Deal Reviews...

*THAT YOU SHOULD BE.*



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# AGENDA

## ACT I

THE TOP 6 THINGS MOST LEADERS LOOK FOR IN DEAL REVIEWS...  
THAT ACTUALLY, **DON'T REALLY MATTER.**

## ACT II

THE TOP 10 MOST COMMON ACTIONS OF LEADERS IN DEAL REVIEWS...  
THAT HURT, **MORE** THAN THEY HELP.

## ACT III

THE 5 STAGES...  
OF A **GREAT** DEAL REVIEW.





# AGENDA

## ACT IV

THE ELEMENTS YOU **SHOULD EVALUATE**: IN A DEAL REVIEW ...

**STAGE 1**: WHEN YOU'RE JUST GETTING STARTED.

## ACT V

THE ELEMENTS YOU **SHOULD EVALUATE**: IN A DEAL REVIEW ...

**STAGE 2**: TO ENSURE REPS ARE MAKING AN INTENTIONAL EFFORT.

## ACT VI

THE ELEMENTS YOU **SHOULD EVALUATE**: IN A DEAL REVIEW ...

**STAGE 3**: TO ENSURE REPS ARE SKILLFUL & EFFECTIVE ON CALLS.





# AGENDA

## ACT VII

THE ELEMENTS YOU **SHOULD EVALUATE**: IN A DEAL REVIEW ...

**STAGE 4**: TO ENSURE REPS ARE ACQUIRING THE "KNOWNs" ON DISCOVERY CALLS.

## ACT VIII

THE ELEMENTS YOU **SHOULD EVALUATE**: IN A DEAL REVIEW ...

**STAGE 5**: TO ENSURE REPS ARE FINDING "UNKNOWNs" ON DISCOVERY CALLS.

## ACT IX

TIPS OVERALL....

ON EXECUTING, AN **EFFECTIVE** DEAL REVIEW.





# AGENDA

## ACT X

**TIPS ON THE DEAL REVIEW “ROLL OUT” ....**  
**& HOW TO AVOID OVERWHELMING YOUR REPS.**

## ACT XI

**WHY REPS AREN'T ADOPTING, OR IMPROVING....**  
**THE EXCUSES THEY'LL GIVE YOU– & ONES ARE FAIR V. UNFAIR.**





1

**THE TOP 6 THINGS THAT  
MOST LEADERS LOOK FOR  
IN DEAL REVIEWS.....  
*THAT DON'T ACTUALLY MATTER.***



# WHAT LEADERS LOOK FOR IN DEAL REVIEWS: THAT DON'T MATTER THING THAT DOESN'T REALLY MATTER #1

IT DOESN'T REALLY MATTER, WHEN REPS HAVE.....

**VERBAL COMMITMENTS  
FROM THE BUYER.**





# WHAT LEADERS LOOK FOR IN DEAL REVIEWS: THAT DON'T MATTER THING THAT DOESN'T REALLY MATTER #2

IT DOESN'T REALLY MATTER, WHEN REPS HAVE.....

**NEXT STEPS BEING SET UP  
WITH THE BUYER.**





# WHAT LEADERS LOOK FOR IN DEAL REVIEWS: THAT DON'T MATTER THING THAT DOESN'T REALLY MATTER #3

IT DOESN'T REALLY MATTER, WHEN REPS HAVE.....

**THE POSITIVE THINGS THE BUYER SAID  
OR COMPLIMENTS THEY GAVE YOU, AS A REP.**





# WHAT LEADERS LOOK FOR IN DEAL REVIEWS: THAT DON'T MATTER THING THAT DOESN'T REALLY MATTER #4

IT DOESN'T REALLY MATTER, WHEN REPS HAVE.....

**THAT YOU HAVE THE "PAIN" OR "IMPACT"  
OR THE THINGS THAT THE BUYER HAS SELF-DIAGNOSED.**





# WHAT LEADERS LOOK FOR IN DEAL REVIEWS: THAT DON'T MATTER THING THAT DOESN'T REALLY MATTER #5

IT DOESN'T REALLY MATTER, WHEN REPS HAVE.....

**WHAT THE BUYER INSISTS ON...**  
**THAT IS WHAT THEY NEED, OR WHAT THEY WANT.**





# WHAT LEADERS LOOK FOR IN DEAL REVIEWS: THAT DON'T MATTER THING THAT DOESN'T REALLY MATTER #6

IT DOESN'T REALLY MATTER, WHEN REPS HAVE.....

**AGREEMENT ON THE PROBLEM  
OR AGREEMENT ON THE “PROBLEM THAT NEEDS TO BE SOLVED”—  
BETWEEN ALL OF THE BUYERS INVOLVED.**





2

**THE TOP 10 MOST COMMON  
THINGS THAT LEADERS DO  
DURING DEAL REVIEWS.....  
*THAT HURT, MORE THAN THEY HELP.***





# THE TOP 10 THINGS LEADERS DO IN DEAL REVIEWS.... THAT HURT, **MUCH MORE** THAN THEY HELP.

1

ASKING FOR REP  
STORIES.

2

ALLOWING "REP  
STORIES".

3

ASKING REPS... "WHAT  
WENT WRONG?"

4

ASKING REPS...  
"WHAT'S HOLDING  
YOU BACK?"





# THE TOP 10 THINGS LEADERS DO IN DEAL REVIEWS.... THAT HURT, **MUCH MORE** THAN THEY HELP.

5

FOCUSING ON JUST  
ONE DEAL TO REVIEW.

6

ONLY COACHING "TO"  
ONE DEAL.

7

ALLOWING THE REP TO  
PICK WHICH DEAL,  
YOU COACH THEM ON.

8

GIVING THE "I THINKS"  
OF ADVICE.





# THE TOP 10 THINGS LEADERS DO IN DEAL REVIEWS.... THAT HURT, **MUCH MORE** THAN THEY HELP.

9

**DOING DEAL REVIEWS,  
AS A GROUP.**

10

**ASKING THE TOP  
SELLER....**

**WHAT THEY THINK –  
WHY THEY WERE  
SUCCESFUL – OR THE  
BEHAVIORS THAT  
OTHER REPS SHOULD  
REPLICATE.**





3

**THE 5 STAGES....**  
***OF A GREAT DEAL REVIEW.***





# THE FIVE STAGES: OF A GREAT DEAL REVIEW

## PRE-STAGE SETUP

**WHAT TO EVALUATE....**  
**FOR THE ONE DEAL IN SPECIFIC, BUT ALSO OVERALL.**





# THE FIVE STAGES: OF A GREAT DEAL REVIEW

## STAGE #1

**WHAT TO EVALUATE AT STAGE 1**  
**AKA— WHEN YOU'RE JUST STARTING TO DO DEAL REVIEWS.**





# THE FIVE STAGES: OF A GREAT DEAL REVIEW

## STAGE #2

**WHAT TO EVALUATE AT STAGE 2**  
**AKA— TO ENSURE YOUR REPS ARE PUTTING IN GENUINE EFFORT.**





# THE FIVE STAGES: OF A GREAT DEAL REVIEW

## STAGE #3

**WHAT TO EVALUATE AT STAGE 3**  
**AKA – TO ENSURE YOUR REPS SELLING SKILLS.**





# THE FIVE STAGES: OF A GREAT DEAL REVIEW

## STAGE #4

**WHAT TO EVALUATE AT STAGE 4**  
**TO ENSURE REPS ARE ACQUIRING THE “KNOWNs” IN DISCOVERY—**  
**AKA. THE BUYER’S COMPLETE SELF-DIAGNOSIS.**





# THE FIVE STAGES: OF A GREAT DEAL REVIEW

## STAGE #5

### WHAT TO EVALUATE AT STAGE 5

TO ENSURE REPS ARE ACQUIRING THE “UNKNOWN” IN DISCOVERY—  
AKA. THE MISDIAGNOSES & MISSED DIAGNOSES OF THE BUYER.





# 4

**STAGE 1:**  
**WHEN JUST STARTING....**  
**& WHAT YOU *SHOULD EVALUATE* AT STAGE 1.**





# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

## STAGE 1: WHEN YOU'RE JUST STARTING DEAL REVIEWS.

1

**HAS THE REP EVEN  
BEGUN FILLING OUT...**

**THE DEAL REVIEW  
TEMPLATE— & IF SO,  
WHAT % OF DISCO  
CALLS, HAVE THEY  
STARTED TO FILL OUT  
THE DEAL REVIEW  
TEMPLATE.**

2

**ARE THE TARGETED  
METRICS.....**

**FILLED OUT FOR THE  
BUYER PERSONA? &  
WHAT % OF THE REPS  
DEALS, ARE THE  
TARGETED METRICS  
FILLED OUT?**

3

**IS THE LAGGING  
INDICATOR GOAL....**

**FILLED OUT FOR THE  
BUYER PERSONA? &  
WHAT % OF THE REPS  
DEALS, IS THE BUYER  
PERSONA'S LAGGING  
INDICATOR GOAL,  
FILLED OUT?**

4

**IS ACHIEVEMENT OF THE  
LAGGING INDICATOR...**

**FOR THE BUYER  
PERSONA, FILLED OUT? &  
WHAT % OF THE REPS  
DEALS, IS THE BUYER'S  
LAGGING INDICATOR  
ACHIEVEMENT, FILLED  
OUT?**



# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

## STAGE 1: WHEN YOU'RE JUST STARTING DEAL REVIEWS.

5

IS COLUMN 1A (BUYER SELF-DIAGNOSIS)...

FILLED OUT? WHAT % OF COLUMN 1A, IS FILLED OUT? & WHAT % OF THE REPS' DEALS, HAVE COLUMN 1A FILLED OUT?

6

IS COLUMN 1B (SELF-DIAGNOSIS FACTS)...

FILLED OUT? WHAT % OF COLUMN 1B, IS FILLED OUT? & WHAT % OF THE REPS' DEALS, HAVE COLUMN 1B FILLED OUT?

7

IS COLUMN 2 (THE REPS' DIAGNOSIS)...

FILLED OUT? WHAT % OF COLUMN 2, IS FILLED OUT? & WHAT % OF THE REPS' DEALS, HAVE COLUMN 1B FILLED OUT?

8

IS COLUMN 3 (THE DIFFERENCE B/W 1 & 2)...

FILLED OUT? WHAT % OF COLUMN 3, IS FILLED OUT? & WHAT % OF THE REPS' DEALS, HAVE COLUMN 3 FILLED OUT?



5

**STAGE 2:**  
**TO ENSURE REP EFFORT....**  
**& WHAT YOU *SHOULD EVALUATE* AT STAGE 2.**





# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

**STAGE 2: TO ENSURE REPS, ARE INVESTING GENUINE EFFORT .**

1

**HOW MANY QUESTIONS  
DID THE SELLER ASK...**

**DURING THE CALL? HOW  
MANY QUESTIONS DID  
THE SELLER ASK, ON  
AVERAGE, ON CALLS?**

2

**HOW MANY QUESTIONS  
DID THE SELLER ASK....**

**THAT WERE "REPEAT  
QUESTIONS", FROM THE  
QUALIFYING CALL? &  
HOW MANY REPEAT  
QUESTIONS, WERE  
ASKED, ON THEIR CALLS,  
ON AVERAGE?**

3

**HOW MANY QUESTIONS  
DID THE SELLER ASK....**

**THAT WERE  
RESEARCHABLE,  
WITHOUT ? & HOW  
MANY REPEAT  
QUESTIONS, WERE  
ASKED, ON THEIR CALLS,  
ON AVERAGE?**

4

**WHEN THE BUYER  
TALKED....**

**WHAT % OF THE TIME  
DID THE REP,  
FOLLOW-UP WITH A  
QUESTION V. TALKING?  
WHAT WAS THE  
AVERAGE %, OVER ALL  
OF THE CALLS?**



# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

**STAGE 2: TO ENSURE REPS, ARE INVESTING GENUINE EFFORT .**

5

**DID THE REP, WATCH  
THE QUALIFYING CALL?**

**WHAT % OF THE DEALS,  
ON AVERAGE– WAS  
THE QUALIFYING CALL  
WATCHED BY THE REP?  
(FACTS OF THE  
CONTEXT WERE  
MENTIONED.)**

6

**DID THE REP, UNCOVER  
THE CONTEXT?**

**WHAT % OF THE  
DEALS, ON AVERAGE–  
DID THE REP UNCOVER  
THE CONTEXT? (THE  
CONTEXT OF HOW  
THEY CAME IN.)**

7

**DID THE SELLER,  
RESEARCH THE BUYER?**

**WHAT % OF THE  
DEALS, ON AVERAGE–  
DID THE REP RESEARCH  
THE BUYER? (FACTS  
ABOUT THE BUYER  
WERE MENTIONED.)**

8

**HOW MANY CASE  
STUDIES ON AVERAGE...**

**DID THE SELLER TALK  
ABOUT, ON THE CALL  
WITH THE BUYER? HOW  
MANY ON AVERAGE DID  
THE SELLER TALK ABOUT,  
OVER ALL OF THE CALLS?**





# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

**STAGE 2: TO ENSURE REPS, ARE INVESTING GENUINE EFFORT .**

9

**HOW MANY QUESTIONS  
DID THE REP ASK.....**

**ON THE CALL, THAT  
LASTED OVER A MINUTE?  
HOW MANY QUESTIONS  
ON AVERAGE DID THE  
REP ASK LASTING OVER  
A MINUTE, OVER ALL  
CALLS?**

10

**HOW MANY RANTS (1  
MIN. + SPEECHES)...**

**DID THE SELLER GO ON,  
ON THE CALL? HOW  
MANY RANTS, DID THE  
SELLER GO ON, PER  
CALL, ON AVERAGE?**

11

**HOW MANY TIMES, ON  
THE CALL DID THE REP...**

**GIVE "EXAMPLE  
ANSWERS" TO THE  
BUYER? HOW MANY  
TIMES DID THEY OFFER  
"EXAMPLE ANSWERS"  
TO BUYERS, PER CALL,  
ON AVERAGE?**

12

**HOW MANY TIMES, ON  
THE CALL DID THE REP...**

**GIVE "METRIC  
SUGGESTIONS" TO THE  
BUYER? HOW MANY  
TIMES DID THEY OFFER  
THEM TO BUYERS, PER  
CALL, ON AVERAGE?**



# 6

**STAGE 3:  
TO ENSURE REP SKILL....  
& WHAT YOU *SHOULD EVALUATE* AT STAGE 3.**





# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

**STAGE 3: TO ENSURE REPS, ARE SKILLED & EFFECTIVE SELLERS .**

1

**WHAT % OF THE CALL SUMMARY POINTS....**

**ARE ABOUT THE ORG— V. THE BUYER'S ORG? & WHAT % OF THE CALL SUMMARY POINTS, ARE ABOUT THE ORG V. THE BUYER ON AVERAGE?**

2

**WHEN THE BUYER MENTIONED AN ISSUE..**

**WHAT % OF THE TIME DID THE SELLER "DOUBLE DOWN" WITH A QUESTION? & WHAT % OF THE TIME DID THEY "DOUBLE DOWN" OVERALL?**

3

**WHAT % OF THE QUESTIONS ASKED...**

**BY THE SELLER ON THE CALL, WERE LEADING QUESTIONS? & WHAT % OF THE QUESTIONS ASKED ON ALL OF THE CALLS, WERE LEADING, OVERALL?**

4

**WHAT % OF THE QUESTIONS ASKED...**

**BY THE SELLER ON THE CALL, WERE BANT QUESTIONS? & WHAT % OF THE QUESTIONS ASKED ON ALL OF THE CALLS, WERE BANT, OVERALL?**





# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

**STAGE 3: TO ENSURE REPS, ARE SKILLED & EFFECTIVE SELLERS .**

5

**WHAT % OF THE  
QUESTIONS ASKED...**

**BY THE SELLER ON THE  
CALL, WERE TRAP  
QUESTIONS? & WHAT  
% OF THE QUESTIONS  
ASKED ON ALL OF THE  
CALLS, WERE TRAP,  
OVERALL?**

6

**WHAT % OF THE  
QUESTIONS ASKED...**

**BY THE SELLER ON THE  
CALL, WERE DIGITAL  
QUESTIONS? & WHAT  
% OF THE QUESTIONS  
ASKED ON ALL OF THE  
CALLS, WERE DIGITAL,  
OVERALL?**

7

**WHAT % OF THE  
QUESTIONS ASKED...**

**BY THE REP ON THE  
CALL, WERE SUBJECTIVE  
QUESTIONS? & WHAT %  
OF THE QUESTIONS  
ASKED ON ALL OF THE  
CALLS, WERE  
SUBJECTIVE, OVERALL?**

8

**WHAT % OF THE  
QUESTIONS ASKED...**

**BY THE REP ON THE  
CALL, WERE "WHAT IF"  
QUESTIONS? & WHAT %  
OF THE QUESTIONS  
ASKED ON ALL OF THE  
CALLS, WERE "WHAT IF",  
OVERALL?**





# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

**STAGE 3: TO ENSURE REPS, ARE SKILLED & EFFECTIVE SELLERS .**

9

WHAT % OF THE  
QUESTIONS ASKED...

BY THE REP ON THE  
CALL, WERE SELF-  
DIAGNOSIS  
QUESTIONS? & WHAT %  
OF THE QUESTIONS ON  
AVERAGE, WERE SELF-  
DIAGNOSIS, OVERALL?

10

WHAT % OF THE  
QUESTIONS ASKED...

BY THE REP ON THE  
CALL, WERE PAIN  
QUESTIONS? & WHAT  
% OF THE QUESTIONS  
ON AVERAGE, WERE  
PAIN, OVERALL?

11

WHAT % OF THE  
QUESTIONS ASKED...

ON THE CALL, WERE  
CONFIRMATION  
QUESTIONS? & WHAT  
% OF THE QUESTIONS  
ON AVERAGE, WERE  
CONFIRMATION,  
OVERALL?

12

WHAT % OF THE  
QUESTIONS ASKED...

ON THE CALL, WERE  
"HAVE YOU EVER..."  
QUESTIONS? & WHAT  
% OF THE QUESTIONS  
ON AVERAGE, WERE  
"HAVE YOU EVER..."  
QUESTIONS, OVERALL?





# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

**STAGE 3: TO ENSURE REPS, ARE SKILLED & EFFECTIVE SELLERS .**

13

**HOW MANY TIMES DID THE REP ON THE CALL...**

**USE THE WORD "IF"? & HOW MANY TIMES ON AVERAGE, DID THE SELLER USE THE WORD IF, ON CALLS, OVERALL?**

14

**WHAT % OF THE TIME WHEN A BUYER USED...**

**A SUBJECTIVE TERM- DID THE REP ASK THEM TO DEFINE IT? & WHAT % OF THE TIME, DID THE REP ASK THE BUYER TO DEFINE THE TERM, OVERALL?**

15

**WHAT % OF THE QUESTIONS ASKED...**

**BY THE SELLER, ON THE CALL- WERE BUILDING OFF OF THE LAST QUESTION? & WHAT % OF THE TIME, WERE THEY BUILDING, ON THE CALLS, OVERALL?**





7

**STAGE 4: TO ENSURE THEY'RE  
ACQUIRING "KNOWN".....  
& WHAT YOU *SHOULD EVALUATE* AT STAGE 4.**





# COLUMN 1A

**ENSURING THE SELLER ACQUIRES  
THE “MANDATORY” SELF-DIAGNOSES.**





# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

**STAGE 4: TO ENSURE REPS, ARE ACQUIRING THE MANDATORY SELF-DIAGNOSES**

1

**DID THE REP ACQUIRE  
THE SELF-DIAGNOSED..**

**DRIVING IMPACT, OF  
THE BUYER? WHAT %  
OF THE TIME IN DEALS,  
DID THE REP ACQUIRE  
THE SELF-DIAGNOSED  
DRIVING IMPACT?**

2

**DID THE REP ACQUIRE  
THE SELF-DIAGNOSED..**

**OUTCOME, OF THE  
BUYER? WHAT % OF  
THE TIME IN DEALS, DID  
THE REP ACQUIRE THE  
SELF-DIAGNOSED  
OUTCOME?**

3

**DID THE REP ACQUIRE  
THE SELF-DIAGNOSED..**

**MASTER PROBLEM, OF  
THE BUYER? WHAT %  
OF THE TIME IN DEALS,  
DID THE REP ACQUIRE  
THE SELF-DIAGNOSED  
MASTER PROBLEM?**

4

**DID THE REP ACQUIRE  
THE SELF-DIAGNOSED..**

**BUSINESS PROBLEM, OF  
THE BUYER? WHAT %  
OF THE TIME IN DEALS,  
DID THE REP ACQUIRE  
THE SELF-DIAGNOSED  
BUSINESS PROBLEM?**



# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

**STAGE 4: TO ENSURE REPS, ARE ACQUIRING THE MANDATORY SELF-DIAGNOSES**

5

**DID THE REP ACQUIRE  
THE SELF-DIAGNOSED..**

**CURRENT OR FUTURE  
IMPACT, OF THE  
BUYER? WHAT % OF  
THE TIME IN DEALS, DID  
THE REP ACQUIRE THE  
SELF-DIAGNOSED  
IMPACT?**

6

**DID THE REP ACQUIRE  
THE SELF-DIAGNOSED..**

**CURRENT OR FUTURE  
EVENT TRIGGER, OF  
THE BUYER? WHAT %  
OF THE TIME IN DEALS,  
DID THE REP ACQUIRE  
THE SELF-DIAGNOSED  
EVENT TRIGGER?**





# COLUMN 1A

**ENSURING THE SELLER ACQUIRES  
ALL SELF-DIAGNOSES THAT EXIST.**





# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

**STAGE 4: TO ENSURE REPS, ARE ACQUIRING ALL SELF-DIAGNOSES THAT EXIST**

1

**DID THE REP ACQUIRE ANY SELF-DIAGNOSED..**

**CURRENT IMPACTS, OF THE BUYER? (PERSONA, HORIZONTAL, OR VERTICAL) WHAT % OF DEALS, DID THE SELLER ACQUIRE THE SELF-DIAGNOSED IMPACTS?**

2

**DID THE REP ACQUIRE ANY SELF-PROGNOSED..**

**FUTURE IMPACTS, OF THE BUYER? (PERSONA, HORIZONTAL, OR VERTICAL) WHAT % OF DEALS, DID THE SELLER ACQUIRE THE SELF-PROGNOSED IMPACTS?**

3

**DID THE REP ACQUIRE ANY SELF-DIAGNOSED..**

**TACTICAL PROBLEMS, OF THE BUYER? WHAT % OF DEALS, DID THE SELLER ACQUIRE THE SELF-DIAGNOSED TACTICAL PROBLEMS?**

4

**DID THE REP ACQUIRE ANY SELF-DIAGNOSED..**

**ROOT CAUSES, OF THE BUYER? WHAT % OF DEALS, DID THE SELLER ACQUIRE THE SELF-DIAGNOSED ROOT CAUSES?**





# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

**STAGE 4: TO ENSURE REPS, ARE ACQUIRING ALL SELF-DIAGNOSES THAT EXIST .**

5

**DID THE REP ACQUIRE  
ANY PRESCRIPTIONS..**

**THAT WERE  
SELF-PRESCRIBED, BY  
THE BUYER? WHAT %  
OF DEALS, DID THE  
SELLER ACQUIRE THE  
SELF- PRESCRIBED  
PRESCRIPTIONS?**





# COLUMN 1B

**ENSURING THE SELLER ACQUIRES  
THE REASONS BEHIND THE SELF-DIAGNOSIS.**





# **FOR ALL IN COLUMN 1A (WHAT THE BUYER SELF-DIAGNOSED)**





**& THE REASONS OR FACTS  
THAT SUPPORT THEIR SELF-DIAGNOSIS...**





**WHAT % OF THE REASONS  
WERE ACQUIRED BY THE SELLER?**





# 8

**STAGE 5: TO ENSURE THEY'RE  
ACQUIRING "UNKNOWN"...**  
**& WHAT YOU *SHOULD EVALUATE* AT STAGE 5.**





# COLUMN 2

**ENSURING THE SELLER  
DEVELOPS THEIR OWN DIAGNOSIS.**





# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

**STAGE 5: TO ENSURE REPS, ARE DEVELOPING THEIR OWN DIAGNOSIS .**

1

**DID THE REP DIAGNOSE  
THE FEASIBILITY....**

**THAT THE BUYER'S  
SELF- DIAGNOSED  
DRIVING IMPACT, CAN  
TRULY BE AVOIDED?  
WHAT % OF DEALS, DID  
THEY DIAGNOSE THIS?**

2

**DID THE REP DIAGNOSE  
THE FEASIBILITY....**

**THAT THE BUYER'S  
SELF- DIAGNOSED  
DRIVING IMPACT, WILL  
ACTUALLY OCCUR?  
WHAT % OF DEALS, DID  
THEY DIAGNOSE THIS?**

3

**DID THE REP DEVELOP  
THEIR OWN DIAGNOSIS:**

**& DEVELOP THEIR OWN  
DIAGNOSIS, WHEN IT  
COMES TO THE  
PROBLEM OUTCOME?  
WHAT % OF DEALS, DID  
THEY DIAGNOSE THIS?**

4

**DID THE REP DEVELOP  
THEIR OWN DIAGNOSIS:**

**& DEVELOP THEIR OWN  
DIAGNOSIS, WHEN IT  
COMES TO THE  
BUSINESS PROBLEM?  
WHAT % OF DEALS, DID  
THEY DIAGNOSE THIS?**





# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

**STAGE 5: TO ENSURE REPS, ARE DEVELOPING THEIR OWN DIAGNOSIS .**

5

**DID THE REP DEVELOP  
THEIR OWN DIAGNOSIS:**

**& DEVELOP THEIR OWN  
DIAGNOSIS, WHEN IT  
COMES TO THE CURRENT  
IMPACTS? WHAT % OF  
DEALS, DID THEY  
DIAGNOSE THIS?**

6

**DID THE REP DEVELOP  
THEIR OWN PROGNOSIS:**

**& DEVELOP THEIR OWN  
PROGNOSIS, WHEN IT  
COMES TO THE FUTURE  
IMPACTS? WHAT % OF  
DEALS, DID THEY  
PROGNOSE THIS?**

7

**DID THE REP DEVELOP  
THEIR OWN DIAGNOSIS:**

**& DEVELOP THEIR OWN  
DIAGNOSIS, WHEN IT  
COMES TO THE  
TACTICAL PROBLEM(S)?  
WHAT % OF DEALS, DID  
THEY DIAGNOSE THIS?**

8

**DID THE REP DEVELOP  
THEIR OWN DIAGNOSIS:**

**& DEVELOP THEIR OWN  
DIAGNOSIS, WHEN IT  
COMES TO THE ROOT  
CAUSE(S)? WHAT % OF  
DEALS, DID THEY  
DIAGNOSE THIS?**



# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

**STAGE 5: TO ENSURE REPS, ARE DEVELOPING THEIR OWN DIAGNOSIS .**

9

**DID THE REP DEVELOP  
THEIR OWN DIAGNOSIS:**

**& DEVELOP THEIR OWN  
DIAGNOSIS, WHEN IT  
COMES TO THE  
PRESCRIPTION? WHAT %  
OF DEALS, DID THEY  
DIAGNOSE THIS?**

10

**DID THE REP DEVELOP  
THEIR OWN DIAGNOSIS:**

**& DEVELOP THEIR OWN  
DIAGNOSIS, AROUND  
THE CURRENT EVENT  
TRIGGER(S)? WHAT %  
OF DEALS, DID THEY  
PROGNOSE THIS?**

11

**DID THE REP DEVELOP  
THEIR OWN PROGNOSIS:**

**& DEVELOP THEIR OWN  
PROGNOSIS, WHEN IT  
COMES TO THE FUTURE  
EVENT TRIGGER(S)?  
WHAT % OF DEALS, DID  
THEY PROGNOSE THIS?**





# COLUMN 3

**ENSURING THE SELLER HAS AN EXPERTISE  
THAT IS A DIFFERENT LEVEL THAN THE BUYER'S.**





# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

**STAGE 5: TO ENSURE REPS, HAVE A HIGHER LEVEL OF EXPERTISE , THAN BUYERS.**

1

**IS THERE A DIFFERENCE  
BETWEEN WHAT THE...**

**BUYER & REP BELIEVES–  
ON THE FEASIBILITY  
THAT THE DRIVING  
IMPACT CAN BE  
AVOIDED? WHAT % OF  
DEALS WAS THERE A  
DIFFERENCE?**

2

**IS THERE A DIFFERENCE  
BETWEEN WHAT THE...**

**BUYER & SELLER  
BELIEVES– ON WHAT  
THE PROBLEM  
OUTCOME IS? WHAT %  
OF DEALS WAS THERE  
A DIFFERENCE?**

3

**IS THERE A DIFFERENCE  
BETWEEN WHAT THE...**

**BUYER & SELLER  
BELIEVES– ON WHAT  
THE BUSINESS  
PROBLEM IS? WHAT %  
OF DEALS WAS THERE  
A DIFFERENCE?**

4

**IS THERE A DIFFERENCE  
BETWEEN WHAT THE...**

**BUYER & SELLER  
BELIEVES– ON WHAT  
THE CURRENT  
IMPACT(S) ARE? WHAT  
% OF DEALS WAS  
THERE A DIFFERENCE?**



# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

**STAGE 5: TO ENSURE REPS, HAVE A HIGHER LEVEL OF EXPERTISE , THAN BUYERS.**

5

**IS THERE A DIFFERENCE  
BETWEEN WHAT THE...**

**BUYER & SELLER  
BELIEVES– ON WHAT  
THE FUTURE  
IMPACT(S) ARE? WHAT  
% OF DEALS WAS  
THERE A DIFFERENCE?**

6

**IS THERE A DIFFERENCE  
BETWEEN WHAT THE...**

**BUYER & SELLER  
BELIEVES– ON WHAT  
THE TACTICAL  
PROBLEM(S) ARE?  
WHAT % OF DEALS WAS  
THERE A DIFFERENCE?**

7

**IS THERE A DIFFERENCE  
BETWEEN WHAT THE...**

**BUYER & SELLER  
BELIEVES– ON WHAT  
THE ROOT CAUSE(S)  
ARE? WHAT % OF  
DEALS WAS THERE A  
DIFFERENCE?**

8

**IS THERE A DIFFERENCE  
BETWEEN WHAT THE...**

**BUYER & SELLER  
BELIEVES– ON WHAT  
THE PRESCRIPTION IS?  
WHAT % OF DEALS WAS  
THERE A DIFFERENCE?**





# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

**STAGE 5: TO ENSURE REPS, HAVE A HIGHER LEVEL OF EXPERTISE , THAN BUYERS.**

9

**IS THERE A DIFFERENCE  
BETWEEN WHAT THE...**

**BUYER & SELLER  
BELIEVES– ON WHAT  
THE CURRENT EVENT  
TRIGGER(S) ARE?  
WHAT % OF DEALS WAS  
THERE A DIFFERENCE?**

10

**IS THERE A DIFFERENCE  
BETWEEN WHAT THE...**

**BUYER & SELLER  
BELIEVES– ON WHAT  
THE FUTURE EVENT  
TRIGGER(S) ARE?  
WHAT % OF DEALS WAS  
THERE A DIFFERENCE?**





# COLUMN 3

**ENSURING THE SELLER IS REGULARLY  
FINDING MISDIAGNOSES: OF THEIR BUYER.**





# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

**STAGE 5: TO ENSURE REPS, ARE FINDING MISDIAGNOSES OF THE BUYER .**

1

**DID THE SELLER FIND A MISDIAGNOSIS...**

**ON THE CALL? WHAT % OF DISCOVERY CALLS, DID THE SELLER FIND A MISDIAGNOSIS?**

2

**HOW MANY MISDIAGNOSES...**

**DID THE SELLER FIND, ON THE CALL? HOW MANY DID THEY FIND, PER CALL, ON AVERAGE?**

3

**HOW BIG WERE THE MISDIAGNOSES....**

**THAT THE SELLER FOUND ON THE CALL? HOW BIG WERE THE MISDIAGNOSES, THAT THE SELLER FOUND, ON AVERAGE, ACROSS ALL CALLS?**

4

**HOW BIG WAS THE IMPACT FROM THE...**

**MISDIAGNOSES THAT THE SELLER FOUND, ON THE CALL? HOW BIG WAS THE IMPACT LINKED TO THEIR MISDIAGNOSES, ON AVERAGE, OVERALL?**



# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

**STAGE 5: TO ENSURE REPS, ARE FINDING MISDIAGNOSES OF THE BUYER .**

5

**HOW CLOSE WAS THE  
IMPACT TO OCCURING:**

**THAT IS THE IMPACT,  
RESULTING FROM THE  
MISDIAGNOSES THE  
SELLER FOUND ON THE  
CALL? HOW CLOSE WAS  
THE OCCURRENCE, ON  
AVERAGE, OVERALL?**

6

**WHAT % OF THE  
MISDIAGNOSES THAT...**

**THE SELLER FOUND ON  
THE CALL– WERE  
TRULY UNKNOWN TO  
THE BUYER? WHAT %  
OF THE MISDIAGNOSES  
WERE UNKNOWN TO  
THE BUYER, OVERALL?**

7

**HOW MANY ACTIONS  
DO THE MISDIAGNOSES:**

**THAT THE SELLER  
FOUND ON CALL,  
CHANGE FOR THE  
BUYER? HOW MANY  
ACTIONS DO THE  
MISDIAGNOSES  
CHANGE, ON AVERAGE?**



# COLUMN 3

**ENSURING THE SELLER IS REGULARLY  
FINDING MISSED DIAGNOSES: OF THEIR BUYER.**





# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

**STAGE 5: TO ENSURE REPS, ARE FINDING MISDIAGNOSES OF THE BUYER .**

1

**DID THE SELLER FIND A MISSED DIAGNOSIS....**

**ON THE CALL? WHAT % OF DISCOVERY CALLS, DID THE SELLER FIND A MISSED DIAGNOSIS, FOR THE BUYER, ON AVERAGE?**

2

**HOW MANY MISSED DIAGNOSES...**

**DID THE SELLER FIND, ON THE CALL? HOW MANY DID THE SELLER FIND, PER CALL, ON AVERAGE?**

3

**HOW BIG WERE THE MISSED DIAGNOSES....**

**THAT THE SELLER FOUND ON THE CALL? HOW BIG WERE THE MISSED DIAGNOSES, THAT THE SELLER FOUND, ON AVERAGE, ACROSS ALL CALLS?**

4

**HOW BIG WAS THE IMPACT FROM THE...**

**MISSED DIAGNOSES THAT THE REP FOUND, ON THE CALL? HOW BIG WAS THE IMPACT LINKED TO THE MISSED DIAGNOSES FOUND ON AVERAGE, OVERALL?**



# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

**STAGE 5: TO ENSURE REPS, ARE FINDING MISDIAGNOSES OF THE BUYER .**

5

**HOW CLOSE WAS THE  
IMPACT TO OCCURING:**

**THAT'S THE IMPACT,  
RESULTING FROM THE  
MISSED DIAGNOSES  
THE REP FOUND, ON THE  
CALL? HOW CLOSE WAS  
THE OCCURRENCE, ON  
AVERAGE, OVERALL?**

6

**WHAT % OF THE  
MISSED DIAGNOSES...**

**THAT THE REP FOUND  
ON THE CALL– WERE  
TRULY UNKNOWN TO  
THE BUYER? WHAT %  
WERE UNKNOWN TO  
THE BUYER, ON  
AVERAGE, OVERALL?**

7

**HOW MANY ACTIONS  
OF THE BUYER CHANGE:**

**BECAUSE OF THE  
MISSED DIAGNOSIS  
THAT THE SELLER  
FOUND ON CALL? HOW  
MANY ACTIONS DO THE  
MISSED DIAGNOSES  
CHANGE, ON AVERAGE?**



# ADDING VALUE

**ENSURING THE SELLER IS REGULARLY GIVING  
UNKNOWN INFO: TO THEIR BUYERS IN DISCOVERY.**





# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

**STAGE 5: TO ENSURE REPS, ARE GIVING UNKNOWN INFO, IN DISCOVERY .**

**1**

**HOW MANY STATS DID THE SELLER, GIVE....**

**TO THE BUYER, DURING THE DISCOVERY CALL? HOW MANY STATS DID THE REP GIVE TO THEIR BUYERS, ACROSS ALL CALLS, ON AVERAGE?**

**2**

**HOW MANY INDUSTRY AVERAGES DID THE REP:**

**GIVE TO THE BUYER, ON THE CALL? HOW MANY INDUSTRY AVERAGES DID THE REP GIVE TO BUYERS, ACROSS ALL CALLS, ON AVERAGE?**

**3**

**HOW MANY BENCHMARKS DID THE REP...**

**GIVE TO THE BUYER, ON THE CALL? HOW MANY BENCHMARKS DID THE REP GIVE TO BUYERS, ACROSS ALL CALLS, ON AVERAGE?**

**4**

**HOW MANY BOILING POINTS DID THE REP...**

**GIVE TO THE BUYER, ON THE CALL? HOW MANY BOILING POINTS DID THE REP GIVE TO BUYERS, ACROSS ALL CALLS, ON AVERAGE?**



# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

**STAGE 5: TO ENSURE REPS, ARE GIVING UNKNOWN INFO, IN DISCOVERY .**

5

**HOW MANY PROBLEM  
RANGES DID THE REP...**

**GIVE TO THE BUYER, ON  
THE CALL? HOW MANY  
PROBLEM RANGES DID  
THE REP GIVE TO  
BUYERS, ACROSS ALL  
CALLS, ON AVERAGE?**





# ADDING VALUE

**ENSURING THE SELLER IS REGULARLY SENDING  
INFO ABOUT UNKNOWN: TO THEIR BUYERS.**





# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

**STAGE 5: TO ENSURE REPS, ARE SENDING UNKNOWN INFO, TO THE BUYER .**

1

**HOW MANY RESOURCES  
DID THE SELLER SEND....**

**TO THE BUYER, PER CALL,  
ACROSS THE DEAL  
CYCLE? HOW MANY DID  
THEY SEND TO A BUYER,  
PER CALL, ACROSS ALL  
DEALS, ON AVERAGE?**

2

**HOW MANY RESOURCES  
DID THE SELLER SEND....**

**TO THE BUYER, PER  
CALL, ACROSS THE DEAL  
CYCLE? HOW MANY DID  
THEY SEND TO A BUYER,  
PER CALL, ACROSS ALL  
DEALS, ON AVERAGE?**

3

**WHAT % OF THE  
RESOURCES THAT....**

**THE SELLER SENT, ARE  
ABOUT UNKNOWN  
S THAT THEY FOUND?  
WHAT % OF THE  
RESOURCES SENT, ARE  
ABOUT UNKNOWN,  
ACROSS ALL DEALS?**

4

**HOW MANY RESOURCES  
DID THE SELLER SEND....**

**TO THE BUYER, WERE  
ABOUT A PROBLEM  
THAT THEY DON'T  
SOLVE FOR? HOW  
MANY, WERE SENT ON  
AVERAGE, PER BUYER,  
ACROSS ALL DEALS?**





# WHAT TO EVALUATE IN DEAL REVIEWS, AT....

**STAGE 5: TO ENSURE REPS, ARE SENDING UNKNOWN INFO, TO THE BUYER .**

5

**HOW MANY RESOURCES  
DID THE SELLER SEND...**

**TO EACH DIFFERENT  
BUYER, IN THE DEAL, PER  
BUYER? HOW MANY, PER  
BUYER, PER DEAL, ON  
AVERAGE, DID THE  
SELLER SEND, OVERALL?**

6

**WHAT WAS THE  
AVERAGE AMOUNT OF:**

**TIME BETWEEN  
RESOURCES SENT, IN  
THE DEAL, PER BUYER?  
WHAT WAS THE  
AVERAGE AMOUNT OF  
TIME, ACROSS ALL  
CALLS, ON AVERAGE?**





# 9

**OVERALL TIPS.....**  
***ON EXECUTING **A GREAT** DEAL REVIEW.***





# OVERALL TIPS....

## ON EXECUTING **AN EFFECTIVE DEAL REVIEW** .

**1**

**BUILD A RUBRIC FOR DEAL REVIEWS....**

**THAT IS CENTRAL, ESTABLISHED, & KNOWN, BY ALL REPS ON THE TEAM.**

**2**

**ENSURE ALL OF THE FIELDS OF THE RUBRIC..**

**ARE OBJECTIVE IN NATURE, NOT SUBJECTIVE.**

**3**

**DON'T FOCUS THE COACHING...**

**(IN LARGE PART) ON ONE OFF CASES, OR ONE DEAL, IN SPECIFIC– BUT RATHER, BROADER TRAITS.**

**4**

**HAVE A CALENDAR REMINDER SET...**

**TO ROUTINELY WATCH 15 MINUTES, OF YOUR REPS CALLS, PER DAY. (PREFERABLY IN THE MORNING, FIRST THING.)**



# OVERALL TIPS....

## ON EXECUTING **AN EFFECTIVE DEAL REVIEW** .

5

**HAVE A CALENDAR  
REMINDER SET...**

**FOR YOUR REPS, TO  
WATCH THEIR OWN  
CALLS FOR 15 MINUTES  
PER DAY. (PREFERABLY  
SET IN THE MORNING)**

6

**FOCUS ON THE  
COMMON THEMES...**

**ACROSS ALL CALLS,  
VERSUS JUST ONE  
CALL IN SPECIFIC.**

7

**FOCUS ON THINGS THE  
REP IS DOING POORLY..**

**CONSISTENTLY,  
ACROSS ALL OF THE  
CALLS, VERSUS JUST  
ONE CALL IN SPECIFIC.**

8

**YOU CAN GIVE “DEEP  
ADVICE”, BUT.....**

**EVERY CALL– GIVE 2  
THINGS IN SPECIFIC,  
THAT THEY NEED TO  
IMPROVE, BY THE NEXT  
CALL.**



# OVERALL TIPS....

## ON EXECUTING **AN EFFECTIVE DEAL REVIEW** .

9

**REVISIT THE 2 PIECES  
OF ADVICE YOU GIVE...**

**ON THE FOLLOWING  
DEAL REVIEW– TO SEE  
IF THEY IMPROVED IT, &  
IF SO, BY HOW MUCH.**

10

**DON'T MOVE ON FROM  
THE 2 THINGS LISTED...**

**UNTIL THE IMPROVE  
THE 2 ITEMS– AND TO  
THE DEGREE THAT YOU  
ASKED, IN THE FORMER  
DEAL REVIEW.**

11

**DOCUMENT ALL OF THE  
FEEDBACK GIVEN.**

12

**PREPARE & DOCUMENT  
ALL OF THE FEEDBACK...**

**BEFORE THE ACTUAL  
DEAL REVIEW– DON'T  
“DO IT IN THE  
MOMENT”.**





# OVERALL TIPS....

## ON EXECUTING **AN EFFECTIVE DEAL REVIEW** .

**13**

**ALWAYS HAVE ONE  
MAJOR TAKEAWAY...**

**FROM THE COACHING  
SESSION– THAT YOU  
DON'T MOVE ON,  
FROM, UNTIL IT IS  
IMPROVED.**

**14**

**SITE SPECIFIC CLIPS IN  
THEIR CALLS....**

**OF EXAMPLES OF  
WHAT THEY DID  
INCORRECTLY– OR  
THEM DOING/NOT  
DOING, WHAT YOU  
WANT THEM TO  
IMPROVE.**

**15**

**MAKE SURE IT DOESN'T  
TURN INTO A.....**

**“ADVICE ROUND”,  
WHERE YOU'RE GIVING  
IN THE MOMENT  
ADVICE, WITHOUT  
PREPARATION, ON ONE  
DEAL IN SPECIFIC.**

**16**

**MAKE SURE THE DEAL  
REVIEW DOESN'T....**

**TURN INTO AN  
“ACCOUNTABILITY  
EXERCISE”– WHERE THE  
PURPOSE IS FOR THEM  
TO COMMIT TO NEXT  
STEPS, & MAKING SURE  
THAT THEY DO THEM.**



# OVERALL TIPS....

## ON EXECUTING **AN EFFECTIVE DEAL REVIEW** .

17

IF YOU HAVEN'T  
PREPARED NOTES....

AHEAD OF TIME, THEN  
CANCEL THE MEETING.

18

IF THEY HAVEN'T  
PREPARED A CALL...

QUESTIONS, OR NOTES  
AHEAD OF TIME, THEN  
CANCEL THE MEETING.

19

DON'T HOLD THE DEAL  
REVIEW....

OR COACHING  
SESSION– AS A GROUP  
REVIEW, WITH THE  
TEAM.

20

DON'T ASK THE TOP  
REP, TO DELIVER...

THEIR OPINION OF  
“WHAT THEY DID  
WELL”, OR “WHAT  
OTHERS SHOULD DO”,  
AS A DEAL REVIEW.  
(THEY DON'T KNOW)



# OVERALL TIPS....

## ON EXECUTING **AN EFFECTIVE DEAL REVIEW** .

21

**IF YOU'RE GOING TO  
HAVE THE GROUP....**

**LISTEN IN TO A DEAL  
REVIEW CALL- FOCUS  
ON 1 CALL, WITH 1 REP,  
BUT LET THE BROADER  
GROUP LISTEN TO THE  
FEEDBACK.**

22

**IF YOU'RE GOING TO  
DO DEAL REVIEWS....**

**AS A GROUP, MAKE  
SURE THAT YOU  
ROTATE- WHICH REP'S  
CALL YOU USE, IN THE  
REVIEW THAT'S DONE.  
( & SPREAD EVENLY )**

23

**WHEN YOU DO GROUP  
REVIEWS, LIKE THIS...**

**HOLD EVERYONE  
ACCOUNTABLE, TO  
THE ONE MAJOR  
TAKEAWAY- EVEN  
THOUGH IT'S JUST  
FROM 1 REP'S CALL.**





# 10

**TIPS ON “ROLL OUT”....  
& HOW TO AVOID OVERWHELMING  
YOUR REPS DURING IT.**





# TIPS ON HOW TO AVOID OVERWHELMING REPS

## TIP #1

**TELL THE REP IT'S COMPLETELY OKAY  
WHEN THEY "MESS UP", OR MAKE A MISTAKE.**





# TIPS ON HOW TO AVOID OVERWHELMING REPS

## TIP #2

**MAKE IT COMPLETELY OKAY TO “MESS UP”  
BUT THE ONLY THING THAT’S NOT OKAY, IS QUITTING.**





# TIPS ON HOW TO AVOID OVERWHELMING REPS

## TIP #3

**TELL THEM THAT IT DOESN'T SHOW PROGRESS  
TO GET IT PERFECT— BUT RATHER, THAT THEY'RE NOT GROWING.**





# TIPS ON HOW TO AVOID OVERWHELMING REPS

## TIP #4

**HAVE THE REPS: FOCUS ON 1 BUYER PERSONA  
THAT'S NEW AT A TIME— WHEN THEY'RE LEARNING ABOUT BUYERS.**





# TIPS ON HOW TO AVOID OVERWHELMING REPS

## TIP #5

**HAVE THE REPS: FOCUS ON 1 NEW BUYER  
FOR A 3 WEEK PERIOD– & THEN ROTATE BUYERS YOU'RE LEARNING.**





# TIPS ON HOW TO AVOID OVERWHELMING REPS

## TIP #6

**DO “METRIC TESTS” EVERY OTHER WEEK**  
**WHERE THEY HAVE TO REPEAT 5 NEW BUYER METRICS, THEY’VE LEARNED.**





# TIPS ON HOW TO AVOID OVERWHELMING REPS

## TIP #7

**MONITOR THE AMOUNT OF “METRIC MENTIONS”  
THE REP MAKES, PER CALL, OVER TIME. (& SEE IF IT GROWS)**





# TIPS ON HOW TO AVOID OVERWHELMING REPS

## TIP #8

**“ESCALATE” THE DEAL REVIEWS**  
**STEP BY STEP— AND GRADUALLY, OVER TIME.**





# HOW TO ESCALATE DEAL REVIEWS....

## STEP BY STEP– & GRADUALLY OVER TIME.

1

FIRST START THE DEAL REVIEW PROCESS....

BY ENCOURAGING THE REPS– TO JUST START FILLING OUT THE DEAL REVIEW TEMPLATE.

2

THEN, ENCOURAGE THE REPS TO FIND....

THEIR BUYER'S "TARGETED METRIC" ON THE DISCOVERY CALL, FOR EACH OF THEIR DEALS.

3

THEN, ENCOURAGE THE REPS TO....

INCREASE THE % OF THE TIME, THAT THEY'RE FINDING THE TARGETED METRIC– UNTIL IT'S 100% OF THE TIME.

4

THEN, ENCOURAGE THE REPS TO FIND....

THE LAGGING INDICATOR GOAL & ACHIEVEMENT OF THE BUYER, ON THE DISCO CALL, FOR EACH OF THEIR DEALS.



# HOW TO ESCALATE DEAL REVIEWS....

## STEP BY STEP– & GRADUALLY OVER TIME.

5

THEN, ENCOURAGE THE REPS TO....

INCREASE THE % OF THE TIME, THAT THEY'RE FINDING THE **LAGGING INDICATOR GOAL & ACHIEVEMENT** – UNTIL IT'S 100%.

6

THEN, ENCOURAGE THE REPS TO FIND....

THE **BUYER'S SELF-DIAGNOSIS (1A)**, ON THE DISCOVERY CALL, IN EACH OF THEIR DEALS.

7

THEN, ENCOURAGE THE REPS TO....

INCREASE THE % OF THE TIME, THAT THEY'RE FINDING THE **BUYER'S SELF-DIAGNOSIS (1A)** UNTIL IT'S 100%, OF THE TIME.

8

THEN, ENCOURAGE THE REPS TO FIND....

THE **"WHY" BEHIND THE BUYER'S SELF-DIAGNOSIS (1B)**, ON THE DISCOVERY CALL, IN EACH OF THEIR DEALS.



# HOW TO ESCALATE DEAL REVIEWS....

## STEP BY STEP– & GRADUALLY OVER TIME.

9

THEN, ENCOURAGE THE REPS TO INCREASE...

THE % OF THE TIME, THAT THEY'RE FINDING THE "WHY" BEHIND THE BUYER'S SELF-DIAGNOSIS (1B) UNTIL IT'S 100%, OF THE TIME.

10

THEN, ENCOURAGE THE REPS TO....

DEVELOP THEIR OWN DIAGNOSIS (2), FOR EACH OF THEIR BUYERS, IN EACH OF THEIR DEALS.

11

THEN, ENCOURAGE THE REPS TO INCREASE...

THE % OF THE TIME, THAT THEY'RE DEVELOPING THEIR OWN DIAGNOSIS (2)– UNTIL IT'S 100%, OF THE TIME.

12

THEN, ENCOURAGE THE REPS TO....

FIND UNKNOWNNS FOR THE BUYER (3), FOR EACH OF THEIR BUYERS, IN EACH OF THEIR DEALS.



# HOW TO ESCALATE DEAL REVIEWS....

## STEP BY STEP– & GRADUALLY OVER TIME.

1  
3

THEN, ENCOURAGE THE  
REPS TO INCREASE...

THE % OF THE TIME,  
THAT THEY'RE **FINDING  
UNKNOWN'S (3)** FOR  
THEIR BUYER– UNTIL  
IT'S 100%, OF THE TIME,  
& GROW THE NUMBER.

14

THEN, ENCOURAGE  
THE REPS TO FIND....

**FIND MISDIAGNOSIS &  
MISSED DIAGNOSIS  
FOR THEIR BUYER (3),**  
FOR EACH OF THEIR  
BUYERS, IN EACH OF  
THEIR DEALS.

15

THEN, ENCOURAGE THE  
REPS TO INCREASE...

THE % OF THE TIME THAT  
THEY'RE **FINDING  
MISDIAGNOSES &  
MISSED DIAGNOSES–** &  
THEN INCREASE THE  
NUMBER THEY FIND.



# 11

**WHY REPS AREN'T  
ADOPTING OR IMPROVING...  
& THE EXCUSES THEY'LL GIVE YOU—  
THAT ARE **FAIR** V. **UNFAIR**.**





# THE FAIR REASONS

**WHY SELLERS AREN'T ADOPTING—  
OR IMPROVING OVER TIME.**





# THE FAIR REASONS....

WHY THE SELLERS **AREN'T ADOPTING** , OR **IMPROVING OVER TIME** .

1

THE REP HAS A MISUNDERSTANDING....

OF THE GOAL IN DISCOVERY– SO THEY'RE NOT ABLE TO EXECUTE WELL, OR ASK THE RIGHT QUESTIONS.

2

THE REP HAS A MISUNDERSTANDING...

OF WHAT A "GOOD QUESTION" IS– BECAUSE THEY'RE UNCLEAR OF THE POINT OF DISCOVERY.

3

THE "DEAL REVIEW" RUBRIC.....

ISN'T DOCUMENTED, WELL KNOWN, OR WELL UNDERSTOOD BY THE REP.

4

THE "DEAL REVIEW" RUBRIC....

IS BASED ON SUBJECTIVE CRITERIA– THAT THE REP CAN'T EASILY UNDERSTAND, OR RECOGNIZE THEY'RE DOING/NOT.





# THE FAIR REASONS....

WHY THE SELLERS **AREN'T ADOPTING** , OR **IMPROVING OVER TIME** .

5

**THE “DEAL REVIEW”  
RUBRIC.....**

**REQUIRES THE SELLER,  
TO SELF-DIAGNOSE, TO  
FILL IN THE CRITERIA  
FOR THE DEAL REVIEW.  
(EX. DO THEY HAVE A  
BIG PROBLEM?)**

6

**THE DEAL REVIEWS  
HAVE BECOME AN....**

**“I THINK” GAME,  
BASED ON LOOSE  
ADVICE, THAT ISN'T  
SYSTEMIC.**

7

**THE DEAL REVIEW  
DOESN'T REQUIRE....**

**ANY PREPARATION OF  
THE MANAGER  
BEFOREHAND, SO THEY  
DON'T VALUE IT  
BECAUSE THEY THINK  
THEY DIDN'T PUT A LOT  
INTO THE REVIEW.**

8

**THE DEAL REVIEW  
CRITERIA CHANGS....**

**& CHANGES REGULARLY  
OVER TIME– SO THEY  
FEEL LIKE IT'S A  
“MOVING GOAL POST”.**





# THE FAIR REASONS....

WHY THE SELLERS **AREN'T ADOPTING** , OR **IMPROVING OVER TIME** .

9

THE LEADER DOESN'T  
ACTUALLY WATCH....

WHAT THE SELLER IS  
DOING BEFORE THE  
CALL IS HELD– SO THEY  
THINK THAT IT  
DOESN'T APPLY TO  
THEM, IN SPECIFIC.

10

THE LEADER DOESN'T  
ACTUALLY WATCH....

WHAT THE SELLER IS  
DOING BEFORE THE  
CALL IS HELD– SO THEY  
THINK THAT THE  
LEADER ISN'T TAKING  
IT SERIOUSLY.

11

THE REP DOESN'T  
BELIEVE THAT THE....

LEADER COULD DO  
BETTER, IF THEY WERE  
TRYING TO SELL–  
BASED ON THE SKILL  
LEVEL THEY'VE  
PROVED, OVER TIME.

12

THE LEADER DOESN'T  
KNOW THE BUYER....

OR DOESN'T KNOW  
THE BUYER, AS MUCH  
AS THE REPS WHO  
THEY'RE COACHING  
DOES.



# THE FAIR REASONS....

WHY THE SELLERS **AREN'T ADOPTING** , OR **IMPROVING OVER TIME** .

13

THE "ADVICE" THAT  
THE LEADER IS....

GIVING IN DEAL  
REVIEWS– IS LOOSE, &  
WITHOUT A COMMON  
THREAD OR  
DENOMINATOR OF  
LOGIC TO IT.

14

THE SELLER ISN'T  
CONFIDENT THAT...

THE LEADER HAS ONE  
SOLID TRAIN OF  
THOUGHT– & THAT IT  
WON'T CHANGE, EVEN  
IF THEY DO HAVE ONE.

15

THE DEAL REVIEWS,  
AREN'T CAUSING....

AN INCREASE IN  
CONVERSION, OR  
SUCCESS FOR THE REP.

16

THE ADVICE THAT THE  
LEADER IS GIVING....

ISN'T WORKING FOR  
THE REP, WHEN THEY  
DEPLOY IT– MAKES THE  
QUOTA ATTAINMENT  
OF THE REP WORSE, OR  
DOESN'T IMPROVE IT.





# THE UNFAIR REASONS

**WHY SELLERS AREN'T ADOPTING—  
OR IMPROVING OVER TIME.**





# THE UNFAIR REASONS....

WHY THE SELLERS **AREN'T ADOPTING** , OR **IMPROVING OVER TIME** .

1

THE SELLER JUST ISN'T FILLING OUT....

THE RUBRIC– BECAUSE THEY DON'T WANT TO TO FILL OUT PAPERWORK.

2

THE SELLER SAYS THAT THEY....

“HAVE THEIR OWN STYLE”– & THINK THAT THEY NEED TO DO THAT, INSTEAD OF “STICKING TO A RIGID STRUCTURE”.

3

THE SELLER INSISTS THAT EVERY CASE....

IS DIFFERENT– SO IT'S NOT WORTH COACHING TO DEALS OVERALL, BECAUSE “IT DOESN'T APPLY”.

4

THEY SAY THAT THEY “NEED AN EXAMPLE”.





# THE UNFAIR REASONS....

WHY THE SELLERS **AREN'T ADOPTING** , OR **IMPROVING OVER TIME** .

5

THEY SAY BROAD  
TRAINING....

DOESN'T APPLY TO  
THEM, IN THEIR  
SPECIFIC USE CASE.

6

THEY SAY THAT  
THEY'RE TOO BUSY....

"WITH ALL OF THE  
STUFF THAT THEY  
HAVE, GOING ON."

7

THEY ACUSE YOU OF  
MICRO-MANAGING.







---

# IN SUMMARY...







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**THE END.**

