

DIAGNOSTIC SELLING....

SEASON 4

EPISODE 6



The 3 Metrics that Define a Buyer's Problems

(& EXAMPLES FOR 10 BUYERS)



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AGENDA

ACT I

WHAT ARE THE 3 METRICS? (AND WHY DO THEY MATTER)

ACT II

EXAMPLES: OF THE 3 METRICS.

ACT III

HOW TO KNOW THE 3 METRICS: WITH USING AI.

ACT IV

HOW TO KNOW THE DIFFERENCE: BETWEEN THE 3 METRICS.

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**WHAT ARE
THE 3 METRICS:
*AND WHY DO THEY MATTER?***



SO....
WHAT ARE THE 3 METRICS?



METRIC #1

LAGGING INDICATORS



WHAT IS A LAGGING INDICATOR...

Definition

AN INDICATOR THAT THE BUYER IS ULTIMATELY METRICED TO DRIVE, & IS THE MAIN METRIC OF SUCCESS.

- **AN OUTPUT.**
- **MEASURED AFTER THE GAME IS OVER.**
- **CONFIRM THE SUCCESS OF SOMEONE.**
- **DEPENDENT ON A LEADING INDICATOR**
- **CAN BE OPTIMIZED FOR IN ISOLATION.**

LAGGING INDICATOR: TIP #1

**THERE'S ONLY 1 (MAX 3)
FOR EACH BUYER.**

*****TYPICALLY 1 MAIN: & 2-3 ANCILLARY*****



LAGGING INDICATOR: TIP #2

**THEY'RE THE FINAL METRIC
THE BUYER IS HIRED & FIRED TO AFFECT.**



LAGGING INDICATOR: TIP #3

**THEY ARE MEASURED
AFTER THE GAME ENDS.**

MEANING ONCE THEY'RE "PUBLISHED", THEY'RE PUBLISHED.



LAGGING INDICATOR: TIP #4

**THEY'RE THE FINAL METRIC THAT
MEASURES THE BUYER'S EFFECTIVENESS.**



LAGGING INDICATOR: TIP #5

THEY ARE THE OUTPUTS.



METRIC #2

LEANING INDICATORS



WHAT IS A LEANING INDICATOR...

Definition

**AN INDICATOR
ANALYZED IN REAL
TIME, TO SHED LIGHT
ON LAGGING
INDICATORS...
BUT ISN'T WHAT THE
BUYER IS METRICED
ON**

- **A MIDPUT.**
- **MEASURED DURING THE GAME.**
- **HELP PREDICT : THE LEVEL OF LAGGING INDICATOR THAT WILL BE ACHIEVED.**
- **THEN DIAGNOSE : WHICH LEADING INDICATOR NEEDS TO BE CHANGED, IF THE LAGGING INDICATOR NEEDS TO BE CHANGED.**
- **THEN RE-ANALYZED : TO SEE IF IT'S THE RIGHT INDICATOR TO CHANGE, & CHANGED ENOUGH TO ACHIEVE THE GOAL.**

LEANING INDICATOR: TIP #1

**THERE'S ABOUT 10 – 15
OF THEM.**



LEANING INDICATOR: TIP #2

**THEY'RE MEASURED
DURING THE GAME.**



LEANING INDICATOR: TIP #3

**THEY ARE USED TO PREDICT:
WHETHER THE LAGGING INDICATOR,
WILL BE ACHIEVED.**

LEANING INDICATOR: TIP #4

THEY'RE ALSO USED TO IDENTIFY:
WHICH LEADING INDICATOR,
SHOULD BE CHANGED.



LEADING INDICATOR: TIP #5

AND THEY ARE USED TO EVALUATE...

IF THE RIGHT **LEADING** INDICATOR WAS CHOSEN,
IF IT WAS CHANGED IN THE RIGHT WAY,
& IF IT WAS CHANGED ENOUGH—
IN ORDER TO HIT THE **LAGGING** INDICATOR GOAL.

LEANING INDICATOR: TIP #6

THEY ARE MIDPUTS.



METRIC #3

LEADING INDICATORS



WHAT IS A LEADING INDICATOR...

Definition

**AN INDICATOR THAT
CAUSES THE
SUBSEQUENT
LEANING & LAGGING
INDICATORS TO
OCCUR**

- **AN INPUT.**
- **MEASURED BEFORE THE GAME BEGINS.**
- **DETERMINE THE ULTIMATE LEVEL OF SUCESS, OF THE LAGGING INDICATOR.**
- **TYPICALLY HARD TO MEASURE.**
- **TYPICALLY DIFFICULT TO DEFINE.**

LEADING INDICATOR: TIP #1

**THERE'S ABOUT 20 – 30
OF THEM.**



LEADING INDICATOR: TIP #2

**THEY'RE MEASURED
BEFORE THE GAME STARTS.**



LEADING INDICATOR: TIP #3

THESE ARE THE INGREDIENTS:

**THAT THE BUYER SELECTS,
AND ARE INPUT TO ULTIMATELY
DRIVE LAGGING INDICATOR SUCCESS.**



LEADING INDICATOR: TIP #4

THEY ARE THE INPUTS.



**AND WHY
DO THEY MATTER?**



THE 3 METRICS: ARE HOW BUYER'S ANCHOR PROBLEMS



HOW TO DEFINE, MEASURE, & DIAGNOSE A PROBLEM

BY FLIP THE SCRIPT

SO... WHAT'S A PROBLEM? *(THE OVERLYING STRUCTURE)*

THE MASTER PROBLEM

CURRENT PROBLEMS			CURRENT IMPACTS			FUTURE IMPACTS		
BUSINESS PROBLEM	TACTICAL PROBLEM	ROOT CAUSE	CURRENT PERSONA IMPACT	CURRENT HORIZONTAL IMPACT	CURRENT VERTICAL IMPACT	FUTURE PERSONA IMPACT	FUTURE HORIZONTAL IMPACT	FUTURE VERTICAL IMPACT
CURRENT PAIN (SYMPTOMS)			CURRENT: EXTENDED PAIN			FUTURE: EXTENDED PAIN		



THE 3 METRICS: ARE HOW YOU MEASURE PROBLEMS

WHAT METRICS DO YOU USE, TO MEASURE THEM?

THE MASTER PROBLEM								
CURRENT PROBLEMS			CURRENT IMPACTS			FUTURE IMPACTS		
BUSINESS PROBLEM	TACTICAL PROBLEM	ROOT CAUSE	CURRENT PERSONA IMPACT	CURRENT HORIZONTAL IMPACT	CURRENT VERTICAL IMPACT	FUTURE PERSONA IMPACT	FUTURE HORIZONTAL IMPACT	FUTURE VERTICAL IMPACT
IS MEASURED BY THE...								
PERSONA'S LAGGING INDICATOR(S)	PERSONA'S LEADING INDICATORS	PERSONA'S LEADING INDICATORS	PERSONA'S EXTENDED PROFESSIONAL INDICATORS	HORIZONTAL TEAM'S LAGGING INDICATOR(S)	VERTICAL LEADER'S LAGGING INDICATOR(S)	PERSONA'S PREDICTED EXTENDED PROFESSIONAL INDICATORS	HORIZONTAL PREDICTED LAGGING INDICATOR	VERTICAL PREDICTED LAGGING INDICATOR
			PERSONA'S PERSONAL INDICATORS	HORIZONTAL LEADING INDICATORS	VERTICAL LEADING INDICATORS	PERSONA'S PREDICTED PERSONAL INDICATORS	HORIZONTAL PREDICTED LEADING INDICATORS	VERTICAL PREDICTED LEADING INDICATORS

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EXAMPLES:
OF THE 3 METRICS.



**WHAT ARE
SOME EXAMPLES?**



EXAMPLE #1

**FUTBOL:
GOALS**



EXAMPLE #2

SDRs:
MEETINGS BOOKED (SALS)



EXAMPLE #3

SALES:
CLOSED-WON REVENUE



EXAMPLE #4

MARKETING:
SQLs



EXAMPLE #5

CUSTOMER SUCCESS:
CUSTOMER RENEWAL



OK SMARTY PANTS.....

**CAN YOU USE SOME NON-GTM,
OR NON-SALES BUYERS?**



EXAMPLE #6

IT DIRECTOR:
SERVER UPTIME



EXAMPLE #7

**HEAD OF PAYMENTS:
*TRANSACTION SUCCESS RATE***



EXAMPLE #8

CFO:
GROSS PROFIT MARGIN



EXAMPLE #9

**CISO:
NUMBER OF SECURITY BREACHES
(# OF INCIDENTS)**

EXAMPLE #10

HR: *EMPLOYEE RETENTION*



THE PUNCHLINE.....
EVERYBODY'S GOT A NUMBER.



THE PUNCHLINE....

**THAT NUMBER, IS WHAT
DEFINES THEIR ROLE AS A PERSONA.**



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**HOW TO GET TO KNOW
THE 3 METRICS:**
QUICKLY WITH USING AI.



STEP 1



STEP 1

FIND THE BUYER'S LAGGING METRIC.

- **THE INDUSTRY AVERAGE OF IT.**
- **AT WHAT POINT, IT'S TYPICALLY A PROBLEM.**

STEP 1: PROMPT

**GIVE ME THE TOP 3 LAGGING INDICATOR KPIs,
THAT A (ROLE) IS MEASURED ON,
THE INDUSTRY AVERAGE OF THOSE KPIs,
& AT WHAT POINT THOSE KPIs ARE TYPICALLY A
PROBLEM FOR A (ROLE).**

STEP 1: EXAMPLE



For a head of payments at a software company that enables user payments, the top three lagging indicator KPIs typically measured are:

Top 3 Lagging Payment KPIs

1. Transaction Success Rate 📊

This KPI measures the percentage of payment transactions that are completed successfully, without errors or failures. It directly reflects the reliability and robustness of your payment infrastructure. A high success rate means more satisfied users and less operational friction.

- **Industry average:** Payment processors generally aim for a transaction success rate above 95%, with best-in-class companies often achieving 98-99%[5][1].

2. Chargeback Rate 🔄

This is the percentage of transactions that are disputed by users and result in funds being returned to them. High chargeback rates can signal fraud, user dissatisfaction, or poor transaction quality. Keeping this rate low is critical for both financial health and reputation.

- **Industry average:** The generally accepted threshold is below 1%. Rates above this can trigger penalties or increased fees from payment networks[5].

3. Authorization Rate ✅

This measures the percentage of attempted transactions that are authorized by banks or card issuers. It gives insight into the efficiency of your payment process and the health of your integration with financial institutions.

- **Industry average:** Most payment companies aim for an authorization rate between 85% and 95%. Top performers exceed 95%[4][5].

STEP 1: CONT.

SEARCH:

**WHICH ONE OF THOSE 3 LAGGING INDICATOR KPIS,
IS TYPICALLY THE MOST IMPORTANT TO A (ROLE)?**



STEP 2



STEP 2

**FIND THE LEADING & LEANING METRICS,
THAT TYPICALLY AFFECT THE LAGGING.**

- **THE INDUSTRY AVERAGE OF THOSE KPIs.**
- **AT WHAT POINT, THEY TYPICALLY CAUSE
A PROBLEM, WITH THE LAGGING INDICATOR.**

STEP 2: PROMPT

**GIVE ME THE TOP 20 LEADING INDICATOR KPIs,
THAT TYPICALLY AFFECT THE
(BUYER'S LAGGING INDICATOR) FOR A (ROLE),
THE INDUSTRY AVERAGE OF THOSE KPIs:**

**& AT WHAT POINT THOSE KPIs TYPICALLY
CAUSE A PROBLEM WITH THE
(BUYER'S LAGGING INDICATOR), FOR A (ROLE).**

STEP 2: EXAMPLE



Here's a comprehensive chart outlining the top 20 leading indicator KPIs that can cause a decrease in transaction success rate for a head of payments at a software company, along with industry averages and the threshold at which each KPI becomes problematic. These leading indicators are actionable—they often reveal issues before the success rate drops, giving you a chance to intervene early.

KPI Name	Industry Average / Target	Problem Threshold (Triggers Success Rate Drop)
1. Payment Gateway Uptime	99.9%+	<99.5%
2. API Response Time	<500ms	>1s
3. Authorization Decline Rate	<10%	>15%
4. Payment Timeout Rate	<1%	>2%
5. Card Not Present Declines	<5%	>8%
6. Incorrect Card Details	<2%	>5%
7. Bank Down/Unreachable Errors	<1%	>2%
8. Duplicate Transaction Attempts	<0.2%	>0.5%
9. Fraud Detection False Positives	<1%	>3%
10. 3D Secure Failure Rate	<2%	>4%
11. Checkout Abandonment Rate	60-70%	>75%
12. Payment Processor Change Failures	<0.5%	>1%
13. Currency Conversion Failures	<0.5%	>1%
14. Network/Connectivity Errors	<1%	>2%
15. Insufficient Funds Declines	5-10%	>15%
16. AVS/CVV Mismatch Rate	<2%	>5%
17. Mobile Payment Failures	<1%	>2%
18. Subscription Renewal Failures	<2%	>5%
19. PCI Compliance Issues	0	Any occurrence
20. Manual Review Rate	<1%	>3%

STEP 3



STEP 3

MEMORIZE THOSE METRICS.



....ET VOILA.



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**HOW TO
KNOW THE DIFFERENCE:
*BETWEEN THE 3 METRICS.***



GENERAL TIPS FOR ALL INDICATORS.



TIP 1

**EACH BUYER PERSONA...
HAS DIFFERENT METRICS.**



TIP 2

EACH BUYER...

**PRIMARYLY CARES ABOUT
THEIR METRICS.**



TIP 3

BUYER → BUYER = DIFFERENT.

(SAME BUYER) ORG → ORG = SAME.

TIP 4

**EVERYTHING IS ANCHORED,
IN RELATIONSHIP TO THEIR METRICS.**



TIPS

ON THE DIFFERENCE BETWEEN: LAGGING V. LEANING



TIP 5

THERE'S TYPICALLY ONLY 1
LAGGING (MAX 3), PER BUYER.

WHEREAS, 15–20 **LEANING**.



TIP 6

JUST ASK YOURSELF...

**WOULD THEY LIKELY GET FIRED,
FOR THE STATE OF THIS INDICATOR?**

IF "YES" = IT'S **LAGGING.**

IF "NO" = IT'S **LEANING.**



TIPS

ON THE DIFFERENCE BETWEEN: LEANING V. LEADING



TIP 7

JUST ASK YOURSELF...

**CAN YOU TYPICALLY BUY IT,
"OUTRIGHT"?**

**IF "YES" = IT'S LEADING.
IF "NO" = IT'S LEANING.**



TIP 8

JUST ASK YOURSELF...

CAN YOU CHANGE IT DIRECTLY?

IF "YES" = IT'S LEADING.

IF "NO" = IT'S LEANING.



5 THE CLOSE.



**SO, HOW ARE WE GOING
TO USE ALL OF THIS....**





**AND WHY
DOES ALL OF THIS MATTER?**





IN SUMMARY...





THE END.

