

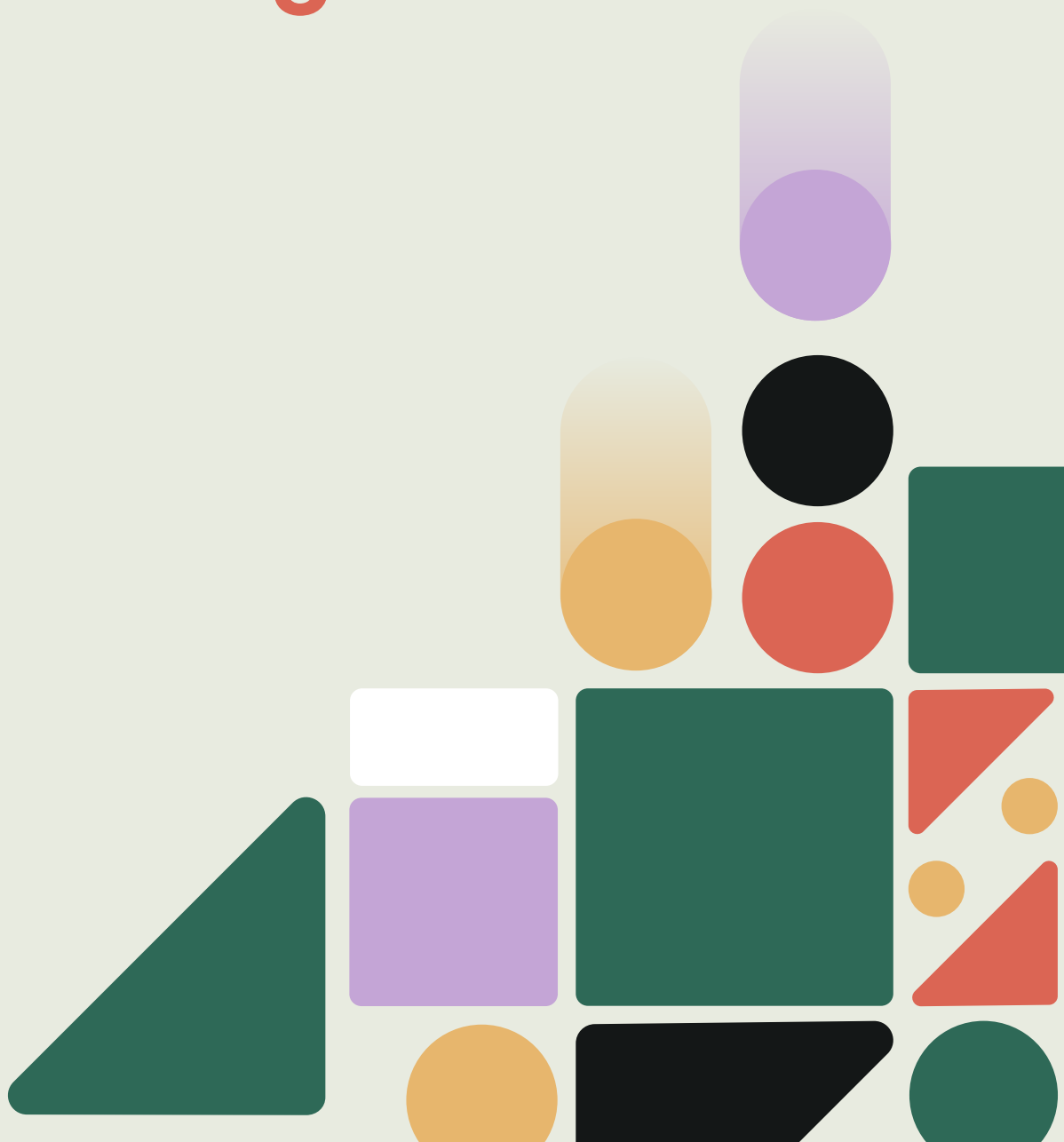
Notch

The Ultimate Account Executive Cheat Sheet Checklist Top Secrets for Closing Deals



4 min read

notch.so



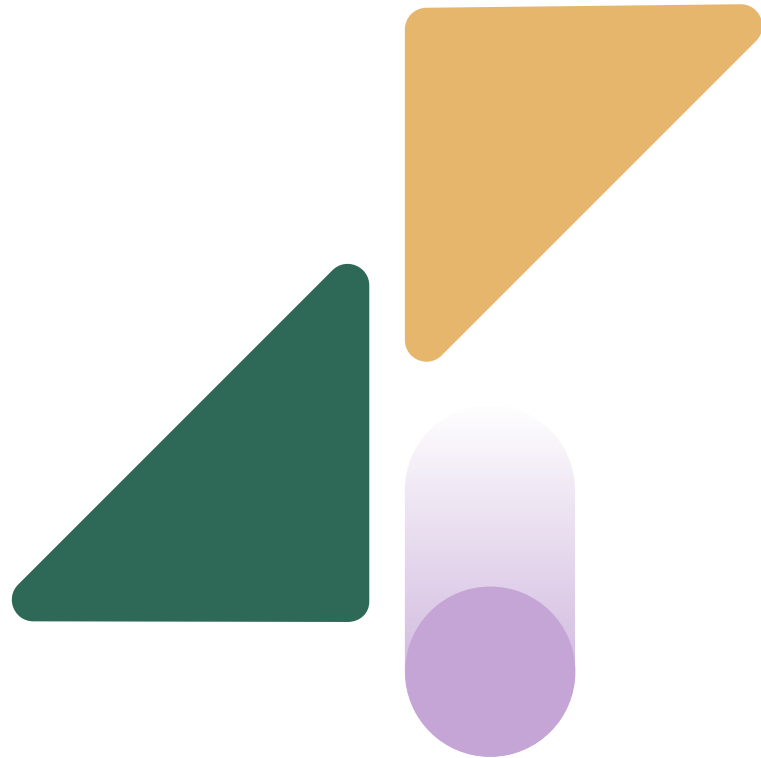
Keep those deals rolling in!

Welcome to „The Ultimate Account Executive Cheat Shee and Checklist: Top Secrets for Closing Deals.“ This cheat sheet is designed to equip account executives with the knowledge and strategies needed to excel in closing deals and achieving sales success. Closing deals is the lifeblood of any account executive and it directly impacts revenue generation and business growth. In this downloadable cheat sheet, you will find valuable insights and actionable tips on preparing for success, mastering the sales process, nurturing relationships, utilizing effective closing techniques, and implementing post-sale follow-up strategies.

New to the Game? No Problem!



Whether you only need a step-by-step checklist for one section or, for them all, feel free to use this cheat sheet however you want!





How to prepare for success

Meticulously crafted, our guide empowers your journey to excellence. Begin by recognizing strengths and areas to improve.

Immerse yourself in product knowledge and sales skills, an unending evolution.

1 Build a strong foundation

- Identify your strengths and areas for improvement
- Enhance product and industry knowledge
- Hone your sales skills through continuous learning and training

2 Research and understand your target audience

- Conduct thorough market research
- Identify customer pain points and needs
- Tailor your approach and messaging to resonate with your target audience

3 Set clear objectives and goals

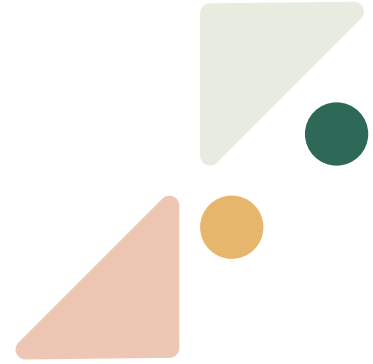
- Define specific, measurable, achievable, relevant, and time-bound (SMART) goals
- Align your goals with organizational targets
- Break down larger goals into smaller, manageable milestones

4 Develop a compelling value proposition

- Clearly articulate the unique value and benefits of your product or service
- Understand the competitive landscape and position your offering effectively
- Communicate how your solution solves customer challenges and delivers ROI.

Mastering the sales process: Top use cases

Your pathway to excellence: Uncover strengths, refine areas, delve into products, and master sales skills.



1 Building rapport and trust with clients

- Establish genuine connections and demonstrating empathy
- Build rapport through active engagement and personalized interactions
- Consistently deliver on promises and meeting client expectations

2 Creating personalized and tailored solutions

- Understand individual client needs and preferences
- Customize solutions to address specific pain points and challenges
- Offer personalized recommendations and strategies

3 Providing exceptional customer service

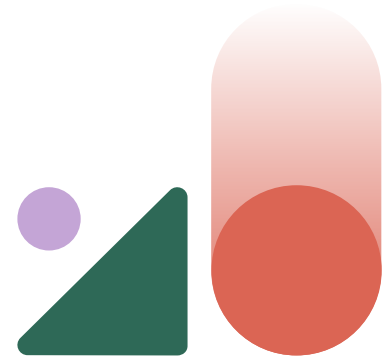
- Respond promptly to client inquiries and concerns
- Go above and beyond to exceed customer expectations
- Proactively seek feedback and address any issues promptly

4 Cultivating long-term partnerships

- Develop a proactive account management approach
- Nurture relationships through regular communication and check-ins
- Identify opportunities for upselling, cross-selling, and expanding the partnership

Nurturing strong relationships

Building enduring connections: Cultivate, strengthen, and enrich relationships through dedicated efforts and genuine interactions.



1 Prospecting and lead gen

- Identify target prospects and ideal customer profiles (ICPs)
- Leverage various channels for lead generation, such as networking, referrals, and digital marketing
- Implementing effective prospecting techniques, including cold calling, email outreach, and social selling

2 Communication and active listening

- Develop strong communication skills, both verbal and written
- Engage in active listening to understand customer needs and pain points
- Use clear and concise language to convey your message effectively

3 Sales meetings and presentations

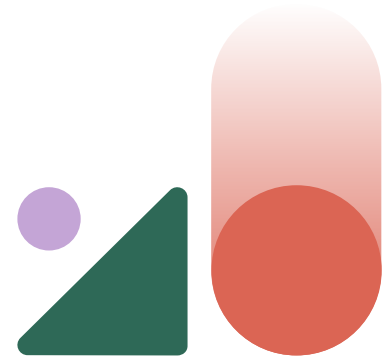
- Plan and structure sales meetings and presentations for maximum impact
- Tailor your message to align with customer interests and objectives
- Use visual aids, storytelling, and demonstrations to engage and persuade your audience

4 Handling objections

- Anticipate and prepare for common objections
- Use and show empathy when addressing concerns
- Provide persuasive and evidence-based responses to overcome objections

Use the best deal closing techniques

Leverage the ultimate deal-closing techniques to secure success. Unleash their power and elevate your outcomes to new heights.



1 Recognizing buying signals and readiness

- Watch for signs of customer interest and buying readiness, both in words and actions.
- Identify key indicators such as asking specific questions about pricing, delivery, or implementation

2 Using persuasive and influential language

- Craft compelling messages that highlight the value and benefits of your product or service
- Use persuasive language techniques such as storytelling, social proof, and testimonials
- Tailor your communication to align with customer needs and motivations

3 Overcoming common closing challenges

- Address objections and concerns raised by the customer
- Provide additional information or clarification to alleviate doubts
- Offer alternative solutions or address specific pain points



Goal Crusher Alert: It's You!

Goals conquered, checklist done!
You're now on the path to exceptional achievements.



Use Notch to up your sales game and close deals faster!

This cheat sheet is just a companion and it won't do the trick without using the best technology to keep your prospects engaged from the get-go. That's why we created Notch.

Notch is a revenue delivery platform where buyers and sellers can interact on different components of the deal, all while putting the focus on the buying experience – from the first offer to becoming an onboarded account. By doing so, we free up revenue teams to focus on their highest-value work, allowing the entire business to move faster. Sales teams get to stop using multiple tools such as email, Slack, Notion, Loom, and Docusign that only overwhelm their prospects.

Why you should choose Notch!



With Notch, everything sellers and buyers need to know and do is all in one place, creating a truly seamless sales experience from day 1!

Discover the future of sales!

Get a demo or explore Notch and get ready for the sales and buying process that puts you in the driver's seat!



Viktor Kessel

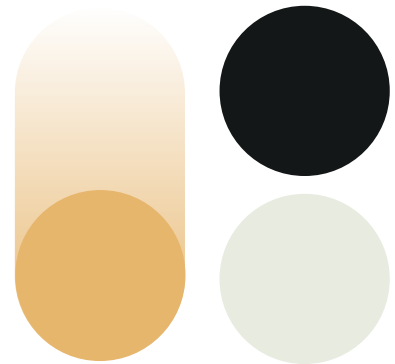
[Book a Demo — it's free!](#)

Notch

Leave spreadsheets and lost buyer follow-up emails in the past. Notch helps you create structured and engaging sales process that ensures your buyer completes the right tasks at the right time.

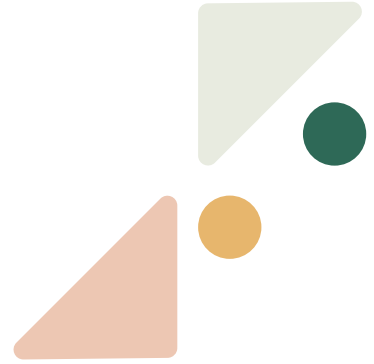


Complete the Overview and Project Summary sections with your prospect in order to align on what you want to achieve. Being in agreement with each other is a crucial step for a successful MAP process!



Overview

- 1 **Overview of the Entire Project:** This section offers an insight into the project's scope and objectives, setting the stage for our collaboration.
- 2 **Objective:** The objective outlines the results we aim to achieve together, guiding our actions and decisions.
- 3 **Kick-off Date:** The proposed kick-off date marks the start of our partnership, transforming plans into actions.
- 4 **Contract Signature Date:** The date for signing the contract signifies our commitment to joint objectives and structured collaboration.
- 5 **Solutions Proposed:** A glimpse into the solutions we offer, showcasing the value we bring to the prospect's business.
- 6 **Cost of Product Estimate \$:** Initial product cost estimate for the prospect's financial planning and trust-building.
- 7 **Cost of Service Estimate \$:** Estimated service cost complements the overall investment, aiding informed decisions.
- 7 **Total Cost \$:** Sum of solutions offered, providing a clear financial overview for informed discussions.



5 Research and qualify

- Gather information about leads' industries, companies, and pain points.
- Determine the suitability and potential fit of leads for your product or service.
- Use tools like LinkedIn, company websites, and industry reports for research.

6 Make outbound calls

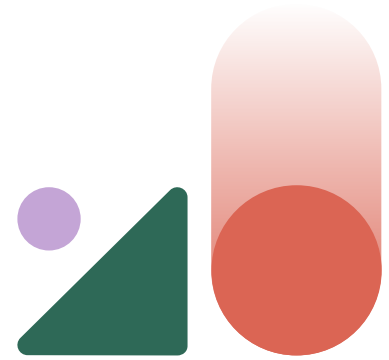
- Prepare a script or talking points for effective communication.
- Focus on building rapport and understanding the prospect's needs.
- Identify potential opportunities and gather relevant information.

7 Send follow-up emails and material

- Personalize emails based on the prospect's needs and interests.
- Provide additional information or resources to nurture the relationship.
- Include a clear call-to-action to encourage the next steps.

8 Schedule meetings and demos

- Coordinate schedules with prospects and internal team members.
- Send out calendar invites with all the necessary details.
- Confirm meeting or demo attendance and ensure everyone is prepared.



9 Collaborate with your sales team

- Maintain open communication channels with the sales team.
- Share lead information, updates, and insights
- Coordinate efforts to ensure a smooth transition from BDR to sales

11 Participate in training and development

- Attend relevant training sessions or webinars.
- Read industry blogs, books, or articles to enhance your knowledge.
- Seek feedback from colleagues or managers to improve your skills.

10 Track and analyze your activities

- Document each call made, email sent, and meeting scheduled.
- Use CRM or tracking tools to log your activities.
- Analyze data to identify trends, assess performance, and make improvements.

12 Work with the marketing team

- Align messaging and campaigns with the marketing team.
- Provide feedback on lead quality and suggest improvements.
- Share insights on customer preferences and pain points.

Keep those leads coming!



13 Network and build strong relationships

- ☐ Attend industry events, conferences, or webinars.
- ☐ Engage in conversations and exchange contact information.
- ☐ Follow up with new connections to nurture relationships.

15 Next day planning

- ☐ Evaluate your achievements, challenges, and areas for improvement.
- ☐ Reflect on what worked well and identify areas for growth.
- ☐ Create a to-do list for the next day to start with a clear focus.

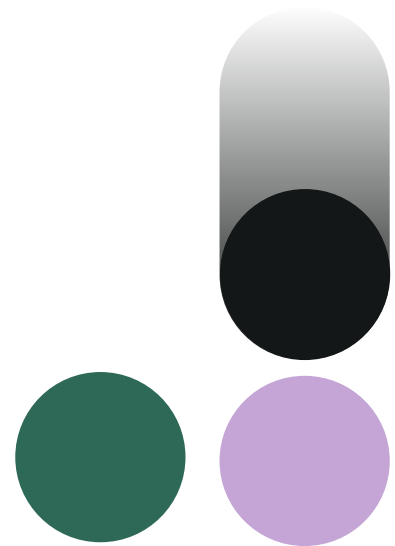
10 Stay organized and manage your time

- ☐ Use productivity tools such as calendars, to-do lists, or project management software.
- ☐ Prioritize tasks based on urgency and importance.
- ☐ Allocate dedicated time blocks for specific activities.



Fantastic Work!
Checklist Conquered!

Ensure alignment by completing both the Overview and Project Summary sections with your prospect. This agreement is vital for a successful MAP process, laying the groundwork for shared objectives and collaborative success.



Overview

- 1 **Prospect's Business Context:** Concisely outline the prospect's industry, market position, and challenges. This insight guides tailored solutions.
 - 2 **Reason for Change:** Address pain points directly for positive operational change. Immediate relief and long-term growth are priorities.
 - 3 **Prospect's Objectives:** Defining shared goals is pivotal. Our solutions must align with their aspirations, streamlining implementation for results.
 - 4 **Why Now?:** Timing matters. Current dynamics and opportunities demand action. Seizing this moment ensures competitive adaptation.
 - 5 **Why You?:** Our strengths and unique solution make us ideal partners. Proven expertise, innovation, and value guarantee returns. Shared values lay the groundwork for success.
- This focused Project Summary aligns strategies, anticipates challenges, and establishes a foundation for a prosperous MAP process.

Build your MAP project plan by using the Timeline & Action Plan section. First, define each stage of the prospect journey. Then, define each task along with the owner of that action. Don't forget to include a deadline.

Once each task is successfully completed, check the status box. Viewing a MAP in progress naturally incentivizes stakeholders to keep the ball rolling!

Stage	Task	Owner	Deadline	Status
1 (Kick-off discussion stage)				
1.1				
1.2				
2 (Demo stage)				
2.1				
2.2				
2.3				
2.4				
3 (Sign-off)				
3.1				
3.2				
3.3				
4 (Onboarding and set up stage)				
4.1				
4.2				
5 Post-onboarding tasks stage				
5.1				
5.2				
5.3				

Use the Buyer Resources section to add important resources for buyer engagement. By sharing product demos and meeting recordings, FAQ articles, knowledge base resources, and anything else, your prospects will never feel like they are in the dark.

Buyer Resources	
Name of Resource	Add links to files or resources for your customer

Use the Key People section identify all key stakeholders from both your team and your potential buyer’s team.

Key People Customer		
Name of person	Position	Email

Key People Your Team		
Name of person	Position	Email