



Deal Inspection Guide

Sales Leader Install Guide

- GUIDING PRINCIPLES**
- Abundance
 - Detachment
 - Intent
 - Objectivity
 - Authenticity
 - Curiosity
 - Empathy
 - Balance
 - Assertiveness
 - Expert Persona

“So, you’re telling me there’s a chance.” You know this delusional line from a movie classic, & we know you also hear it from your salespeople— a notoriously optimistic bunch that want to hold out hope under any circumstances. Well, sales leaders need to deal with reality, so let’s get real with this tool. The **Deal Inspection Guide** is a *Performance Coaching tool* that helps identify which deals in the sales funnel are real & which are not. The tool is a way for sales leaders to inspect a deal that gets the salespeople to face the reality of where they actually are on that deal. Regular use of this tool is HUGE:

- Deals will be won.
- Forecasts will be corrected.
- Holes in processes will be saved.
- **BONUS:** Once salespeople become familiar with this inspection, they will get better & more disciplined at gaining clarity— getting real— with their prospects.

This install guide will show what to listen for during an inspection & how to use four levels of questioning in the four aspects of each deal.



“I think....”
 “I believe....”
 “My suspicion is....”
 “I don’t think so....”
 “I’m not sure....”
 “I assume....”
 “I’m pretty sure....”

Think-Believes

When you begin to inspect deals with your sales team, you’ll start picking up on the loose language in their responses; these are ‘think-believes.’ Salespeople use this language when they don’t really know the answer but respond in a way that implies they do.

Your efforts in the deal inspections will tease them out & turn them into ‘To Do’ items for your salesperson to gain clarity on.

No One’s in Trouble

This is not a performance review. It’s simply a process to help gain clarity.

Conducting Deal Inspections with the Guide

Deal inspections should take place regularly. Take 30 minutes once a week to inspect two deals. Vary the deals & the salespeople each week.

Inspect these four areas of each deal using clarifying questions that drill down three levels deep.

Deal Area	Definition
Motive	Drills down into what is known about the reasons the customer is looking to us for help.
Money	Uncovers what the discussion around economics has been & the customer’s reaction.
Process	Exposes what we know about the customer’s process for moving the deal through to a yes or no.
Calendar Clarity	Uncovers how concrete the <i>Mutual Timeline Agreement</i> is for this deal.



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Check out these examples of questions that follow the salesperson's response. See how you get more specific?

Your Question: Process	Sample Salesperson Response
0: How will the customer make the decision?	<i>"Just got to get it to the board for final approval."</i>
1: When is the board meeting?	<i>"I think they meet once per month."</i>
2: On what day?	<i>"Not sure of the day."</i>
	Triggers Salesperson "To Do:" Find out when the Board meets.
3: At what time?	

Your Question: Calendar Clarity	Sample Salesperson Response
0: Do you have a CFD?	<i>"Yeah."</i>
1: When is it?	<i>"November 27."</i>
2: What time?	<i>"I think I've got it set for 9am."</i>
3: Have they accepted the invite?	<i>"Haven't sent it yet; it's just in my calendar now."</i>
	Triggers Salesperson "To Do:" Send CFD calendar invite.



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Deal Name:

	0	+1	+2	+3
Motive				
Money				
Process				
Calendar Clarity				

Questioning Example: *Motive*

- 0:** Why are they talking to us?
- +1:** Why are their close rates not where they should be?
- +2:** Do you know or think they're chasing bad deals?
- +3:** What happens if their close rates stay the same?

They want to improve their close rates.
I think they're chasing bad deals.
I don't know for sure. Just gut feel.
I guess their team won't make quota.