



FREE WORKFLOW FIELD GUIDE

10 sales workflows that run the whole *deal*.

The ten end-to-end motions B2B reps reuse every week, from the first trigger on a target account to the renewal conversation. For each one: when to run it, what to gather, the decisions that matter, every step in the chain, and a complete starter prompt you can paste into ChatGPT, Claude, or Gemini today.

10

WORKFLOWS

10

STARTER PROMPTS

78

STEPS MAPPED



How to use this guide

- 01 **Start with the deal in front of you.** The workflows run in deal order, but you do not need to read them in order. Find the stage you are stuck at.
- 02 **Run the starter prompt.** Each workflow includes one complete prompt from its chain, picked for the moment reps most often get wrong. Fill every input you can and write "unknown" rather than guess.
- 03 **Running it on its own?** Some starter prompts ask you to paste the previous step's handoff. Paste your own notes, transcript, or CRM fields there instead.
- 04 **Respect the verdicts.** The prompts return calls like READY, GATHER INFORMATION FIRST, or EXIT. A stop is a saved week, not a failure.
- 05 **You own the decisions.** The prompts prepare, analyze, and draft. Pricing, legal, technical commitments, forecast calls, and anything sent to a buyer stay with you.

The ten workflows

04	Account Prioritization, Trigger Research, and Outbound Prospecting	Prospect & reach out
05	Inbound Qualification and Fast First Response	Prospect & reach out
01	Discovery to Qualified Opportunity Advancement	Qualify & discover
02	Stakeholder Mapping, Champion Development, and Multi-Threaded Deal Strategy	Negotiate & close
06	Tailored Demo, Workshop, and Proof Workflow	Demo & propose
07	Economic Buyer Access and Business-Case Alignment	Demo & propose
03	Mutual Action Plan and Paper-Process Orchestration to Close	Negotiate & close
08	Proposal, Quote, Approvals, and Signature Execution	Negotiate & close
09	Weekly Deal Inspection and Stalled-Deal Rescue	Coach & manage
10	Post-Sale Handoff, Onboarding, Renewal, and Expansion	Onboard & expand



WORKFLOW 04 · PROSPECT & REACH OUT · FOR SDRS AND BDRS

Account Prioritization, Trigger Research, and Outbound Prospecting

Decide which accounts deserve effort now and build outreach on a real reason, not invented urgency — nine prompts, ICP to launch.

Sellers do not just need “more outreach”; they need a reason to work one account now instead of ten others later.

GATHER FIRST

Your ICP and territory rules, a target account list, your offering and use cases, and any CRM history or known contacts.

DECISIONS THAT MATTER

- Whether the account deserves time
- Whether there is a credible trigger
- Which persona to contact first
- Whether the message angle is role-specific enough to earn a reply

YOU FINISH WITH

- Account brief
- Trigger summary
- Contact map
- First-touch narrative
- Sequence tied to that account's context

THE FULL CHAIN · 9 STEPS

4.1	ICP and Account-Priority Model	
4.2	Account Evidence Researcher	
4.3	Trigger and Reason-for-Now Validator	STARTER PROMPT BELOW
4.4	Account Priority Scorer	
4.5	Buyer and Stakeholder Selector	
4.6	Pain and Relevance Hypothesis Builder	
4.7	Outreach Motion Designer	
4.8	Multichannel Sequence Creator	
4.9	Outreach QA and Execution Packager	

Every step in this chain is a full prompt in Promptifi Pro, each one handing its output to the next.



IN PRACTICE · A FICTIONAL DEAL

A BDR at CipherPeak, an enterprise data-security platform, targets Northstar Medical Group, a regional healthcare provider. The account fits the ICP because it has multiple clinics, regulated data, and a distributed IT footprint. During research, the rep finds that Northstar recently acquired two outpatient practices and posted multiple jobs related to IT integration and compliance. The rep infers a likely problem: newly combined environments create visibility gaps around sensitive data and access controls. The contact map identifies a VP of Infrastructure, a Director of Compliance, and a Finance leader overseeing integration costs. The first message to the VP states that acquisitions often leave regulated data spread across inherited file shares and endpoints, then asks whether Northstar is standardizing post-acquisition data controls this quarter. The compliance contact gets a risk-and-proof angle; finance gets an integration-cost and audit-readiness angle. The VP replies that they are in the middle of integration planning and agrees to a call with compliance copied. The account now advances with a documented reason-for-now, two engaged stakeholders, and a concrete discovery hypothesis.

STARTER PROMPT 4.3

Trigger and Reason-for-Now Validator

Running it on its own: where it asks for the previous handoff, paste your own notes instead.

You are acting as a B2B trigger-event analyst, buying-signal verifier, sales-timing strategist, and evidence-integrity reviewer.

OBJECTIVE

Determine whether a current, relevant, supported, commercially meaningful, and appropriate reason exists to prioritize and contact the account now. Do not manufacture urgency.

INPUTS

Paste Prompt 4.2 NEXT-PROMPT HANDOFF:

[PASTE HERE]

(Running standalone? Leave the line above blank and complete the standalone block below.)

STANDALONE BLOCK - complete only if you did not paste a 4.2 handoff

The event: what happened, to whom, on what date

Where you saw it, with the link or publication if you have one

The account it concerns

What you sell and the business outcome it produces

My offering:

Relevant business outcomes:

Potential trigger events:

Potential intent signals:

Known engagement:

Known contract or renewal timing:

Known partner information:

Information that must remain internal:

INSTRUCTIONS

1. Inventory potential signals.
2. Classify as confirmed trigger, confirmed engagement, weak signal, context, historical, sensitive, unsupported, or conflicting.
3. Assess date, source, currentness, relevance, significance, timing meaning, external-reference safety, and expiration.
4. Distinguish trigger, intent, engagement, fit, general news, and hypothesis.
5. Build causal-relevance test.



6. Identify strongest reason for now and strongest reason not to act.
7. Choose trigger-led, initiative-led, role-led, relationship-led, insight-led, reengagement, monitor, or no outreach.
8. Produce trigger verdict, with a confidence label and the basis for it.
9. Create safe and unsafe language guidance.
10. When running standalone, state explicitly which of the assessments above could not be completed for want of the account research the full workflow would have supplied, and how that limits the verdict.

DECISION RULES

- Funding, executives, job postings, regulations, website visits, and old initiatives do not automatically prove need or intent.
- Sensitive events often should not be referenced.
- Private activity must not be presented as public knowledge.
- Allow a no-trigger outcome.
- The confidence label is a judgment against the stated criteria in this prompt, not a measurement. Say what the label rests on
- the dated source, the causal test it passed, the assessments that could not be completed - and never present it as an objective or calculated score.

OUTPUT FORMAT

TRIGGER AND REASON-FOR-NOW ASSESSMENT

```
## 1. Trigger verdict (state the confidence label, the basis for it, and what would change it)
## 2. Signal inventory
## 3. Causal-relevance analysis
## 4. Strongest reason for now
## 5. Reason not to act now
## 6. Recommended outreach basis
## 7. Safe language
## 8. Unsafe language
## 9. NEXT-PROMPT HANDOFF
```



WORKFLOW 05 · PROSPECT & REACH OUT · FOR SDRS AND BDRS

Inbound Qualification and Fast First Response

Decide if an inbound signal is real, respond fast, and route it into the right motion — six prompts, triage to first meeting.

Inbound is a different workflow from outbound because the rep is not creating interest from scratch; the job is to decide whether the signal is real, respond fast, and route the lead into the right motion without wasting executive time.

GATHER FIRST

Lead source and form fields, contact and company details, any CRM matches, your ICP and routing rules, and your response SLA.

DECISIONS THAT MATTER

- Whether the inquiry is a true opportunity
- Who should own it
- Whether it needs immediate human response
- What the first meeting should accomplish

YOU FINISH WITH

- Triage decision
- Owner assignment
- First-response note
- Meeting objective
- Qualification path

THE FULL CHAIN · 6 STEPS

5.1 Inbound Lead Evidence Checker

5.2 **Fit, Intent, and Urgency Triage**

STARTER PROMPT BELOW

5.3 First-Response Strategy Builder

5.4 Inbound Response Creator

5.5 First-Meeting Qualification Planner

5.6 Routing and CRM Handoff Builder

Every step in this chain is a full prompt in Promptifi Pro, each one handing its output to the next.

STARTER PROMPT 5.2

Fit, Intent, and Urgency Triage

Running it on its own: where it asks for the previous handoff, paste your own notes instead.

You are acting as an inbound sales-triage analyst, lead-routing specialist, qualification strategist, and buyer-intent reviewer.

OBJECTIVE

Assess account fit, contact relevance, stated intent, likely urgency, existing relationship, routing, response priority, and next action. Do not treat every inbound signal as an opportunity.

INPUTS

Paste Prompt 5.1 NEXT-PROMPT HANDOFF:
[PASTE HERE]



ICP criteria:
Territory rules:
Routing rules:
Customer-routing rules:
Partner-routing rules:
Product ownership:
Response SLA:
Seller availability:
Information that must remain internal:

INSTRUCTIONS

1. Assess structural fit.
2. Assess contact relevance.
3. Assess intent.
4. Assess urgency using evidence.
5. Assess existing relationship.
6. Determine owner.
7. Assign response priority.
8. Recommend first action.
9. Produce verdict:
 - HIGH-PRIORITY SALES INBOUND
 - QUALIFIED FOR RAPID HUMAN FOLLOW-UP
 - REQUIRES LIGHT QUALIFICATION
 - EXISTING-ACCOUNT COORDINATION
 - CUSTOMER OR SUPPORT ROUTING
 - NURTURE
 - NON-SALES
 - INVALID OR SPAM
 - MANUAL REVIEW

OUTPUT FORMAT

INBOUND FIT, INTENT, URGENCY, AND ROUTING TRIAGE

```
## 1. Triage verdict
## 2. Fit assessment
## 3. Contact relevance
## 4. Intent assessment
## 5. Urgency assessment
## 6. Existing-relationship assessment
## 7. Routing decision
## 8. Response-priority rationale
## 9. First-action recommendation
## 10. NEXT-PROMPT HANDOFF
```



WORKFLOW 01 · QUALIFY & DISCOVER · FOR ACCOUNT EXECUTIVES

Discovery to Qualified Opportunity Advancement

Prep, run, and analyze a discovery call so the deal advances only on real evidence — eight chained prompts from context brief to CRM-ready package.

This is the most broadly valuable workflow because it decides whether a live conversation becomes a real deal or a polite dead end. The best practice is diagnosis before prescription: research first, open with a meeting contract, explore pain and impact, then propose the next step that logically fits what the buyer said.

GATHER FIRST

Company name, meeting purpose, participants, your offering and relevant use cases, known engagement history, and meeting notes or a transcript after the call.

DECISIONS THAT MATTER

- Whether the problem is material
- Whether the impact is measurable
- Whether there is a credible decision path
- Whether the prospect deserves a committed next step

YOU FINISH WITH

- Buyer-stated problem summary
- Qualification notes
- Recommended advancement path
- CRM-ready opportunity rationale

THE FULL CHAIN · 8 STEPS

1.1 Account and Meeting Context Builder

1.2 Discovery Hypothesis Developer

1.3 **Discovery Call Strategy Designer**

STARTER PROMPT BELOW

1.4 Discovery Evidence Extractor

1.5 Buyer Problem and Impact Analyzer

1.6 Qualification and Evidence-Gap Assessor

1.7 Opportunity Advancement Decision

1.8 Discovery Follow-Up and CRM Consolidator

Every step in this chain is a full prompt in Promptifi Pro, each one handing its output to the next.

**IN PRACTICE · A FICTIONAL DEAL**

Continuing the CipherPeak / Northstar Medical Group example, the AE enters discovery knowing that Northstar has acquired new clinics and may be facing post-acquisition data-governance risk. At the start of the call, the AE confirms that the purpose is to understand how Northstar is handling inherited systems, security controls, and audit exposure before deciding whether a technical working session makes sense. The VP of Infrastructure explains that newly acquired file shares and endpoint data are not yet fully mapped. The Director of Compliance adds that the main concern is not only exposure, but proving to auditors that protected data is consistently controlled across new environments. The AE asks what happens if nothing changes before Northstar's next compliance review; the buyer explains that audit preparation will become manual and time-consuming, and any exceptions would create executive scrutiny. The AE then asks who else would weigh in on a vendor decision. The buyers identify the CIO, Security Operations lead, and procurement. The AE summarizes: the problem is post-acquisition visibility and proof of control, the impact is audit risk and manual effort, the likely critical event is the coming review cycle, and the best next step is a 60-minute technical and business validation session with security ops and the CIO's delegate present. The deal advances because the buyers co-created a real next step tied to a known business problem.

STARTER PROMPT 1.3**Discovery Call Strategy Designer**

Running it on its own: where it asks for the previous handoff, paste your own notes instead.

You are acting as a senior B2B discovery-call strategist, consultative conversation designer, sales qualification coach, and meeting-facilitation expert.

OBJECTIVE

Design a practical discovery-call plan that establishes mutual purpose, prioritizes the buyer's reason for meeting, tests the most important hypotheses, diagnoses situation, problems, impact, timing, and decision context, adapts to answers, avoids interrogation and premature pitching, and ends with an appropriate agreed next step.

INPUTS

Paste Prompt 1.2 NEXT-PROMPT HANDOFF:
[PASTE HERE]

Meeting date:
Meeting duration:
Meeting format:
Participants:
My participants:
My role:
Desired buyer value:
My intended commercial outcome:
Known agenda:
Required topics:
Topics that must not be discussed:
Information that must remain internal:

INSTRUCTIONS

1. Create seller, buyer-value, and mutual objectives.
2. Create an opening meeting contract.
3. Allocate time flexibly.
4. Create question architecture across orientation, problem, impact and priority, and decision and advancement.
5. Create branching paths for every essential hypothesis.



6. Create listening guidance.
7. Define when and how to share relevant capability context.
8. Forecast the objections and resistance this specific meeting is likely to produce, adapted to what the hypotheses and the attendee set actually imply - not a generic list. For each: the objection in the buyer's own likely words, the person most likely to raise it, what is usually true underneath it, the question that tests whether it is a real constraint or a reflex, a live response that does not argue, and the point in the call where raising it yourself would cost less than being ambushed by it later. Mark any objection you cannot answer without a commitment you are not authorised to make, and say what you would say instead.
9. Create possible end states.
10. Define evidence-based advancement criteria.
11. Create a live note template.

DECISION RULES

- Follow buyer-introduced priorities.
- Do not argue with rejected hypotheses.
- Explore impact before solution.
- Do not manufacture urgency.
- Determine the correct owner respectfully.
- Clarify what a requested demo must help evaluate.
- Answer direct product questions concisely.
- Close professionally when advancement is unsupported.

OUTPUT FORMAT

DISCOVERY CALL PLAN

- ## 1. Meeting objectives
- ## 2. Opening meeting contract
- ## 3. Flexible meeting flow
- ## 4. Essential discovery paths
- ## 5. Core discovery question bank
- ## 6. Listening guide
- ## 7. Objection and resistance forecast (objection - who raises it - what is underneath - testing question - live response - when to pre-empt)
- ## 8. Relevant-response rule
- ## 9. Advancement criteria
- ## 10. End-of-call paths
- ## 11. Live note-taking template
- ## 12. Pre-call self-check
- ## 13. NEXT-PROMPT HANDOFF TEMPLATE



WORKFLOW 02 · NEGOTIATE & CLOSE · FOR ACCOUNT EXECUTIVES

Stakeholder Mapping, Champion Development, and Multi-Threaded Deal Strategy

Map the buying committee, test whether your contact is a real champion, and find the thread you're missing — seven prompts, single-threaded to covered.

This workflow exists because a deal with one helpful contact is not the same thing as a deal with organizational support. The best practice is to map both influence and responsibility, not just titles.

GATHER FIRST

Account and opportunity context, the buyer problem, your known stakeholders with their interactions, and any known decision or approval process.

DECISIONS THAT MATTER

- Who actually matters
- Which missing stakeholder could kill the deal later
- Whether the current contact is a true champion
- Where the rep is still single-threaded

YOU FINISH WITH

- Stakeholder map
- Role-by-role value narrative
- Champion plan
- Thread-by-thread engagement plan

THE FULL CHAIN · 7 STEPS

2.1 Stakeholder Evidence Inventory

2.2 Buying-Group and Influence Mapper

2.3 **Champion Qualification Test**

STARTER PROMPT BELOW

2.4 Relationship and Access Gap Analyzer

2.5 Stakeholder Value Narrative Builder

2.6 Multi-Threaded Engagement Planner

2.7 Stakeholder Strategy Update and Consolidator

Every step in this chain is a full prompt in Promptifi Pro, each one handing its output to the next.

**IN PRACTICE · A FICTIONAL DEAL**

In the CipherPeak / Northstar Medical Group deal, discovery has already established a real problem around post-acquisition data visibility and compliance proof. The AE inspects the deal and realizes it is still fragile: only the VP of Infrastructure and Director of Compliance are actively engaged. The CIO has not attended, procurement is unknown, and finance has not weighed in on the investment case. The AE and solutions engineer map the missing stakeholders and assign threads: the AE will lead executive and financial conversations, the SE will own technical validation, and a customer success leader will brief implementation planning if the buyer needs proof of rollout realism. They create role-specific narratives: compliance gets audit readiness, infrastructure gets visibility and control, finance gets reduced manual remediation effort, and the CIO gets a cleaner post-acquisition operating model. The AE then works with the buyers to create a mutual action plan that includes a technical validation session, a security review, an executive summary meeting, procurement submission, and legal redlines by specific dates. When procurement asks for extra documentation, the MAP is updated and everyone sees the knock-on impact. Because the plan is shared, the deal remains transparent rather than mysteriously “slipping.” Northstar signs after the CIO and procurement both complete their owned steps, not because the AE “followed up harder,” but because the buyer and seller coordinated the work of buying.

STARTER PROMPT 2.3

Champion Qualification Test

Running it on its own: where it asks for the previous handoff, paste your own notes instead.

You are acting as a B2B champion-development strategist, MEDDPICCC qualification analyst, stakeholder-behavior reviewer, and evidence-quality auditor.

OBJECTIVE

Assess each plausible champion candidate using observed behavior and classify them as confirmed champion, developing champion, coach, active supporter, passive supporter, contact only, unknown, or unlikely champion.

Do not reward friendliness, seniority, responsiveness, or enthusiasm without evidence of influence and action.

INPUTS

Paste Prompt 2.2 NEXT-PROMPT HANDOFF:
[PASTE HERE]

Evidence of introductions:
Evidence of internal information shared:
Evidence of internal advocacy:
Evidence of actions completed:
Evidence of access provided:
Evidence of influence:
Evidence of benefit:
Seller observations:
Information that must remain internal:

INSTRUCTIONS

1. Assess influence, credibility, access, problem understanding, stake, internal context sharing, coaching, introductions, advocacy, mobilization, reliability, and candor.
2. Require behavioral evidence.
3. Identify weak evidence.
4. Classify each candidate.
5. Explain what prevents stronger classification.



6. Create ethical champion tests.
7. Create a development plan for the strongest candidate.
8. Identify coach value.
9. Identify overdependence risk.

OUTPUT FORMAT

CHAMPION QUALIFICATION AND DEVELOPMENT REPORT

- ## 1. Champion summary
- ## 2. Candidate assessment matrix
- ## 3. Behavioral evidence
- ## 4. Champion classification definitions
- ## 5. Ethical validation tests
- ## 6. Champion-development plan
- ## 7. Coach strategy
- ## 8. Champion-risk analysis
- ## 9. NEXT-PROMPT HANDOFF



WORKFLOW 06 · DEMO & PROPOSE · FOR ACCOUNT EXECUTIVES

Tailored Demo, Workshop, and Proof Workflow

Design a demo around the decision the buyer has to make, not a feature tour — eight prompts from scoping to documented next step.

One of the most common sales mistakes is treating the demo as a product event instead of a decision event.

GATHER FIRST

Discovery notes and success criteria, the decision the buyer must make, attendee roles, technical requirements, and any known objections.

DECISIONS THAT MATTER

- Whether a demo is even the right next step
- Which scenarios matter most
- Whether proof should be technical, business, or both
- What evidence the buyer needs to continue

YOU FINISH WITH

- Tailored agenda
- Prioritized use cases
- Evaluation criteria
- Proof artifacts
- Documented next-step decision

THE FULL CHAIN · 8 STEPS

6.1 Demo or Proof Readiness Gate

6.2 Discovery-to-Success-Criteria Synthesizer

6.3 Audience and Decision Mapper

6.4 **Demo Narrative and Use-Case Designer**

STARTER PROMPT BELOW

6.5 Demo Agenda and Runbook Builder

6.6 Proof-of-Value or Evaluation Planner

6.7 Rehearsal and Objection Simulator

6.8 Post-Demo Advancement Analyzer

Every step in this chain is a full prompt in Promptifi Pro, each one handing its output to the next.

STARTER PROMPT 6.4

Demo Narrative and Use-Case Designer

Running it on its own: where it asks for the previous handoff, paste your own notes instead.

You are acting as a B2B demo-story architect, solution-mapping strategist, product-marketing specialist, and buyer-decision editor.

OBJECTIVE

Design a buyer-centered narrative connecting situation, problem, consequence, outcome, use case, capability, evidence, and decision. Do not create a feature tour.

INPUTS



Paste Prompt 6.2 NEXT-PROMPT HANDOFF:

[PASTE HERE]

Paste Prompt 6.3 NEXT-PROMPT HANDOFF:

[PASTE HERE]

Product capabilities:

Supported use cases:

Unsupported or limited capabilities:

Approved proof:

Approved customer examples:

Current buyer process:

Desired buyer process:

Known technical environment:

Information that must remain internal:

INSTRUCTIONS

1. Select the minimum required use cases.
2. Prioritize essential, supporting, optional, or exclude.
3. Define problem, friction, outcome, scenario, capability, proof, stakeholder relevance, criterion, transition, and question.
4. Create narrative arc.
5. Identify pause points.
6. Separate show, explain, reserve, and exclude content.
7. Create business and technical layers.
8. Identify capability gaps.
9. Create truthful gap language.
10. Create evidence capture plan.

OUTPUT FORMAT

DEMO NARRATIVE AND USE-CASE DESIGN

- ## 1. Narrative objective
- ## 2. Use-case priority
- ## 3. Narrative arc
- ## 4. Use-case storyboards
- ## 5. Business and technical layers
- ## 6. Capability-gap handling
- ## 7. Proof-evidence capture
- ## 8. Content to exclude
- ## 9. NEXT-PROMPT HANDOFF



WORKFLOW 07 · DEMO & PROPOSE · FOR ACCOUNT EXECUTIVES

Economic Buyer Access and Business-Case Alignment

Quantify the value, find the real economic buyer, and hand your champion a case they can defend internally — eight prompts.

This workflow becomes essential the moment the rep needs budget confidence, executive support, or cross-functional approval.

GATHER FIRST

A buyer-validated problem and impact, any baseline metrics and buyer data, approved pricing, and your economic-buyer hypothesis.

DECISIONS THAT MATTER

- Whether value is quantified enough to justify action
- Whether the rep has access to the real economic buyer or only influencers
- Whether the champion can carry the case internally
- What commercial logic the buyer will need to defend

YOU FINISH WITH

- Business case
- Executive summary
- Metrics page
- Stakeholder-specific value narrative
- Explicit asks for buyer alignment

THE FULL CHAIN · 8 STEPS

7.1 Business-Case Evidence Gate

7.2 Impact and Metrics Modeler

7.3 Cost-of-Inaction Analyzer

7.4 **Buyer-Defensible Business Case Builder**

STARTER PROMPT BELOW

7.5 Economic Buyer and Access Strategist

7.6 Executive Narrative Creator

7.7 Champion Enablement Packager

7.8 Business-Case Validation and Revision

Every step in this chain is a full prompt in Promptifi Pro, each one handing its output to the next.

STARTER PROMPT 7.4

Buyer-Defensible Business Case Builder

Running it on its own: where it asks for the previous handoff, paste your own notes instead.

You are acting as a B2B business-case architect, value-engineering editor, financial-model reviewer, and buyer-decision support specialist.

OBJECTIVE

Build a buyer-defensible case that makes the current problem, consequence, outcome, proposed change, investment, modeled value, assumptions, scenarios, risks, validation needs, and decision options easy to understand and challenge.



INPUTS

Buyer-validated problem:
Desired outcome:
Proposed solution:
Paste Prompt 7.2 NEXT-PROMPT HANDOFF:
[PASTE HERE]
Paste Prompt 7.3 NEXT-PROMPT HANDOFF:
[PASTE HERE]
Investment:
Implementation approach:
Time horizon:
Currency:
Validation status:
Information that must remain internal:

INSTRUCTIONS

1. Use buyer language.
2. Include current state, problem, consequences, future state, proposed change, investment, financial, operational, risk, strategic value, cost of inaction, scenarios, assumptions, sensitivity, risks, and decision options.
3. Separate buyer-validated, modeled, benchmark, assumed, and qualitative value.
4. Present transparent scenarios.
5. Show gross benefit, total cost, net benefit, payback, ROI, and NPV only when supported.
6. Include no-decision comparison.
7. Include sensitivity and implementation/adoption risk.
8. Include validation register.
9. Create full internal case, buyer-review version, one-page summary, and finance checklist.

OUTPUT FORMAT

BUYER-DEFENSIBLE BUSINESS CASE

```
## 1. Decision summary
## 2. Current-state case
## 3. Proposed future state
## 4. Value model
## 5. Cost model
## 6. Financial summary
## 7. Nonfinancial value
## 8. Assumption register
## 9. Risk and mitigation
## 10. Decision options
## 11. Validation register
```

BUYER-REVIEW VERSION

ONE-PAGE SUMMARY

FINANCE-REVIEW CHECKLIST

NEXT-PROMPT HANDOFF



WORKFLOW 03 • NEGOTIATE & CLOSE • FOR ACCOUNT EXECUTIVES

Mutual Action Plan and Paper-Process Orchestration to Close

Turn a good feeling into a dated path to signature with a buyer-built plan that exposes the paper process early — seven prompts to close.

This is the highest-value late-stage workflow because it turns “we feel good about this” into a real path to signature.

GATHER FIRST

A buyer-validated problem and outcome, the target date and why it matters, known buying committee, and any known decision, procurement, or legal steps.

DECISIONS THAT MATTER

- Whether the buyer has actively contributed to the plan
- Whether dates are buyer-driven or seller fantasy
- Whether contract and security steps are visible early enough
- Whether slips are being exposed rather than hidden

YOU FINISH WITH

- Shared plan
- Milestone calendar
- Buyer and seller owners
- Deliverables
- Visible record of what changed and why

THE FULL CHAIN • 7 STEPS

3.1 Mutual Plan Readiness Gate

3.2 Buyer Outcome and Critical Event Validator

3.3 Decision-Process Mapper

3.4 Paper-Process Mapper

3.5 **Mutual Action Plan Builder**

STARTER PROMPT BELOW

3.6 Buyer Validation and Revision Planner

3.7 Milestone and Slippage Inspector

Every step in this chain is a full prompt in Promptifi Pro, each one handing its output to the next.

STARTER PROMPT 3.5

Mutual Action Plan Builder

Running it on its own: where it asks for the previous handoff, paste your own notes instead.

You are acting as a B2B mutual action plan architect, customer collaboration specialist, project-sequencing analyst, and buyer-facing document editor.

OBJECTIVE

Create a clear buyer-facing mutual action plan that helps both organizations coordinate the buyer's evaluation and purchasing



decision. The plan must be buyer relevant, collaborative, evidence based, easy to maintain, clear about owners and dependencies, honest about provisional information, and free of internal forecast language.

INPUTS

Validated buyer outcome:

Desired value or result:

Critical-event classification:

Governing date:

Decision date:

Implementation or value date:

Decision-process handoff:

[PASTE]

Paper-process handoff:

[PASTE]

Known buyer owners:

Known seller owners:

Current completed milestones:

Current in-progress milestones:

Buyer terminology:

Information excluded from the buyer-facing plan:

Information that must remain internal:

INSTRUCTIONS

1. Begin with the buyer outcome and success evidence.
2. State the plan purpose as a working coordination tool, not a purchase commitment.
3. Build only applicable milestones across business validation, technical evaluation, security/privacy, business case, stakeholder alignment, decision, procurement, legal, signature, and implementation readiness.
4. For each milestone include objective, buyer value, owners, date, status, dependency, input, completion evidence, and question.
5. Mark dates and ownership as confirmed, proposed, provisional, or unknown.
6. Distinguish activity, deliverable, acceptance, and decision.
7. Define statuses.
8. Create a shared risk section.
9. Create maintenance rules.
10. Produce buyer-facing and internal pre-share versions.

OUTPUT FORMAT

BUYER-FACING MUTUAL ACTION PLAN

```
## 1. Shared objective
## 2. Purpose of this plan
## 3. Plan assumptions
## 4. Milestone plan
## 5. Decision and approval checkpoints
## 6. Technical and risk workstreams
## 7. Current open questions
## 8. Shared risks and dependencies
## 9. Status definitions
## 10. Maintenance rules
```

INTERNAL PRE-SHARE REVIEW

```
## Items safe to share
## Items requiring buyer validation
```



```
## Items that must remain internal
## Missing owners
## Missing dates
## Unsupported assumptions
## Recommended buyer-review agenda

## NEXT-PROMPT HANDOFF
```



WORKFLOW 08 · NEGOTIATE & CLOSE · FOR ACCOUNT EXECUTIVES

Proposal, Quote, Approvals, and Signature Execution

Get the commercial package right the first time — pricing, approvals, redlines, and signer path — eight prompts to signature.

This workflow matters because many deals do not die from lack of interest; they die from commercial friction.

GATHER FIRST

An approved solution and scope, pricing and discount rules, buyer and seller legal entities, the signer map, and your internal approval path.

DECISIONS THAT MATTER

- Whether the commercial package matches the actual buying motion
- Whether quote accuracy is high enough to avoid rework
- Which approvals must happen before the document goes out
- Whether the document experience helps the buyer buy

YOU FINISH WITH

- Approved quote
- Proposal or commercial package
- Version-controlled redlines
- Signer map
- Clean path to signature and payment

THE FULL CHAIN · 8 STEPS

8.1 Commercial Readiness Gate

8.2 Scope and Configuration Validator

8.3 Pricing and Approval Brief Builder

8.4 Proposal Strategy Architect

8.5 Commercial Package Drafting Assistant

8.6 Contract and Paper-Process Tracker

8.7 **Negotiation and Redline Decision Support**

STARTER PROMPT BELOW

8.8 Signature and Closed-Won Handoff Builder

Every step in this chain is a full prompt in Promptifi Pro, each one handing its output to the next.

STARTER PROMPT 8.7

Negotiation and Redline Decision Support

Runs on its own. Fill the inputs and paste it in.

You are acting as a B2B negotiation-preparation analyst, commercial-tradeoff strategist, redline-issue organizer, and approval-boundary reviewer.

OBJECTIVE

Organize negotiation issues and options without providing legal advice or approving concessions.



INPUTS

Open commercial issues:
Open legal issues:
Buyer requests:
Seller position:
Approved boundaries:
Pricing:
Terms:
Business value:
Critical event:
Alternatives:
Approvers:
Information that must remain internal:

INSTRUCTIONS

1. Classify price, scope, term, payment, liability, security, service, implementation, renewal, termination, and other issues.
2. Identify buyer interest.
3. Identify seller interest.
4. Identify tradeoff options.
5. Identify required approvals.
6. Identify precedent risk.
7. Create negotiation plan.
8. Create escalation list.

DECISION RULES

- Do not approve concessions.
- Do not interpret legal enforceability.
- Do not trade without authority.
- Do not concede value without reciprocal movement.
- Do not create fake deadlines.
- Do not hide nonstandard terms.

OUTPUT FORMAT

NEGOTIATION AND REDLINE SUPPORT

Issue summary

Issue matrix

| Issue | Buyer request | Seller position | Business impact | Options | Approval |

Tradeoff plan

Questions

Concession boundaries

Escalations

Meeting plan

NEXT-PROMPT HANDOFF



WORKFLOW 09 • COACH & MANAGE • FOR REPS AND THEIR MANAGERS

Weekly Deal Inspection and Stalled-Deal Rescue

Inspect what actually changed each week, catch stalls early, and either rescue the deal or downgrade it honestly — seven prompts.

The best reps do not wait for quarter-end panic to inspect a deal.

GATHER FIRST

Current CRM record, stage and close date, recent buyer and seller activity, stakeholder list, and what changed since the last inspection.

DECISIONS THAT MATTER

- Whether the deal is real
- Whether it is stalling
- Whether it needs intervention
- Whether forecast confidence should rise or fall

YOU FINISH WITH

- Risk summary
- Action plan
- Forecast posture
- Either a rescue motion or an honest downgrade

THE FULL CHAIN • 7 STEPS

9.1 Weekly Deal-State Reconstructor

9.2 Qualification Gap Inspector

9.3 Engagement and Momentum Risk Analyzer

9.4 Forecast Confidence Assessor

9.5 Stalled-Deal Root-Cause Diagnostician

9.6 **Deal Rescue or Exit Planner**

STARTER PROMPT BELOW

9.7 Weekly CRM and Manager Summary

Every step in this chain is a full prompt in Promptifi Pro, each one handing its output to the next.

STARTER PROMPT 9.6

Deal Rescue or Exit Planner

Runs on its own. Fill the inputs and paste it in.

You are acting as a B2B deal-rescue strategist, opportunity-allocation advisor, buyer-reengagement planner, and pipeline-discipline reviewer.

OBJECTIVE

Recommend the correct path:

- Rescue
- Reset
- Additional discovery
- Stakeholder expansion
- Executive alignment
- Rebuild business case
- Technical remediation
- Replan commercial process



- Nurture
- Downgrade
- Close lost
- Disqualify

INPUTS

Root-cause handoff:
Forecast handoff:
Account importance:
Buyer value:
Available resources:
Current relationship:
Current risks:
Possible next actions:
Information that must remain internal:

INSTRUCTIONS

1. Evaluate every plausible path.
2. Recommend one primary and one fallback.
3. Define buyer value.
4. Define buyer action.
5. Define seller action.
6. Define stop condition.
7. Define resource requirement.
8. Create customer-facing reset or rescue language.
9. Create professional exit language where appropriate.
10. Define reentry conditions.

DECISION RULES

- Do not rescue solely because seller effort is high.
- Do not escalate executives without buyer value.
- Do not create artificial urgency.
- Do not continue when no priority exists.
- Do not close lost solely because the buyer is temporarily delayed.
- Do not preserve forecast to avoid internal discomfort.
- Do not use sunk cost as justification.

OUTPUT FORMAT

DEAL RESCUE OR EXIT PLAN

Recommended path
Options analysis
| Path | Evidence | Risk | Buyer value | Suitability |

Action plan
Buyer-facing communication
Internal resource plan
Stop conditions
Reentry conditions
NEXT-PROMPT HANDOFF



WORKFLOW 10 • ONBOARD & EXPAND • FOR ACCOUNT MANAGERS AND CSMS

Post-Sale Handoff, Onboarding, Renewal, and Expansion

Carry every promise from the sale into onboarding, then drive renewal and evidence-based expansion — ten prompts across the customer lifecycle.

In recurring-revenue B2B motions, a seller's job does not stop at signature.

GATHER FIRST

The executed contract and order form, the business case and mutual action plan, discovery notes, the stakeholder map, and implementation details.

DECISIONS THAT MATTER

- Whether the customer achieved early value
- Whether risk is emerging
- Whether there is a credible upsell or cross-sell path
- How to coordinate account management, customer success, and sales without creating a jarring customer experience

YOU FINISH WITH

- Handoff brief
- Success timeline
- Renewal plan
- Risk review
- Expansion playbook

THE FULL CHAIN • 10 STEPS

10.1 Closed-Won Commitment Extractor

10.2 Sales-to-Post-Sale Handoff Builder

10.3 Customer Kickoff Planner

10.4 Joint Success and Impact Plan Builder

10.5 Adoption and Customer-Health Reviewer

10.6 Customer Risk Intervention Planner

10.7 **Renewal Readiness Assessor**

STARTER PROMPT BELOW

10.8 Expansion Signal Validator

10.9 Expansion Strategy Builder

10.10 Executive Account and CRM Consolidator

Every step in this chain is a full prompt in Promptifi Pro, each one handing its output to the next.

STARTER PROMPT 10.7

Renewal Readiness Assessor

Runs on its own. Fill the inputs and paste it in.

You are acting as a B2B renewal strategist, customer-value reviewer, commercial-risk analyst, and stakeholder-alignment specialist.



OBJECTIVE

Assess renewal readiness using realized value, adoption, stakeholder support, commercial process, and risk.

INPUTS

Contract:
Renewal date:
Pricing:
Usage:
Adoption:
Value:
Health:
Stakeholders:
Support:
Commercial process:
Information that must remain internal:

INSTRUCTIONS

1. Assess value realized.
2. Assess adoption.
3. Assess health.
4. Assess stakeholder support.
5. Assess economic authority and renewal owner.
6. Assess procurement and legal process.
7. Assess pricing risk.
8. Assess competition and status quo.
9. Create renewal status:
 - Strong
 - Likely with work
 - At risk
 - Critical
 - Unknown
10. Create renewal plan and buyer conversation.

OUTPUT FORMAT

RENEWAL READINESS REPORT

```
## Verdict
## Value evidence
## Adoption
## Stakeholders
## Commercial process
## Risks
## Renewal plan
## Buyer conversation
## CRM update
## NEXT-PROMPT HANDOFF
```



KEEP GOING

You have the map and ten starters. Pro has every *step*.

All 78 prompts across these ten workflows, each built to hand its output to the next, live in Promptifi Pro alongside a library of 2,900+ tested prompts for B2B sales reps.

[PROMPTIFI.CO/PRICING](https://promptifi.co/pricing)