



The  
**Sales**  
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# The Qualification Challenge

How to avoid premature presentation syndrome and boost your win rate





# The Qualification Challenge

Opportunity Qualification seems to be the Achilles Heel of most sales organisations. It's hard to know where to focus and, more importantly, how to build certainty about where you are, what's missing and your confidence level. When executed well, it enables accurate forecasting and wider downstream resourcing once deals are won.

This is a challenge because it's more than a methodology. It concerns the required mindset, skills, behaviours, approaches and tools to enable the methodology to be successfully carried out.

We broadly understand qualification as the ongoing evaluation of potential clients or opportunities to determine whether they exhibit the characteristics that make them a good fit for our product or service, and if we are a good fit for them.

In more candid terms, whether or not it is worth continuing to explore, given the time and investment that is needed on both sides.

So, why is poor qualification so widespread?  
Why are so many teams losing more often than they win?

Here are some of the things we routinely see when engaging with clients to diagnose sales challenges:

- Qualification is talked about but not deeply understood
- No consistent approach to qualifying **with** the client
- Poor training and tools to enable the conversations that are pivotal for qualification
- Weak links between qualification and deal approval
- Sales people too eager to pitch (premature presentation syndrome)
- Pipeline overloaded with unqualified deals
- Win rates depressed by focusing on the wrong opportunities

There is abundant evidence that a methodical approach outweighs a random or haphazard one when applying appropriate rigour to qualification. This is especially true in business development where opportunities are won in new and existing accounts.

Furthermore, in high-value complex sales with multiple stakeholders and long sales and buying cycles, some of the established qualification methods such as BANT, MAN, CHAMP and others can be deemed simplistic or encourage sellers to focus on the wrong dimensions too soon e.g. Budget or Money.

We have developed our proprietary and unique **Revenue Qualification Framework** to address this issue. It harnesses more than 100 collective years of experience, countless client engagements, expert views from thought leading practitioners, and tens of thousands of pursuits. It's different because it embeds client value through our **Value Framework** at the heart of qualification. It's also fuelled by our **Sales Accelerator Methodology** to guide and enable teams to have the essential conversations to make them effective.

|                            |                       |                              |                  |                                 |                                     |                        |
|----------------------------|-----------------------|------------------------------|------------------|---------------------------------|-------------------------------------|------------------------|
| R <sub>1</sub>             | E <sub>1</sub>        | V <sub>4</sub>               | E <sub>1</sub>   | N <sub>1</sub>                  | U <sub>1</sub>                      | E <sub>1</sub>         |
| <b>Rationale And Risks</b> | <b>Effective Plan</b> | <b>Value Drivers</b>         | <b>Economics</b> | <b>Named Coach And Champion</b> | <b>Understand Decision Dynamics</b> | <b>Exact Solution</b>  |
| Compelling Reason To Act   | Pursuit Plan          | Pillars of Value Established | Business Case    | Advocate As Champion            | Process                             | Client Validation      |
| Strategic Alignment        | Win Plan              | Pillars of Value Quantified  | Budget           | Internal Coach                  | People                              | Execution Plan         |
| Risk Assessment            | Differentiation       | Pillars of Value Qualified   | Timing & People  | Contact Plan                    | Close Plan                          | Acceptable Commercials |

At a high level, here's what rigorous qualification looks like:

## Rationale And Risks

There is a clear compelling reason for the client to do something, supported by a business case. The opportunity is aligned with strategic priorities and constraints have been identified and are manageable.

Risks have been fully assessed on both sides and there is a plan in place to mitigate them.

## Effective Plan

A pursuit plan exists after all team members have been identified and key meetings scheduled. There is a credible win plan with clear 'win themes' to outmanoeuvre competitors, including 'do nothing' and 'do it themselves'. Differentiation is clear with relevant, distinct and memorable messaging, tested with the client.

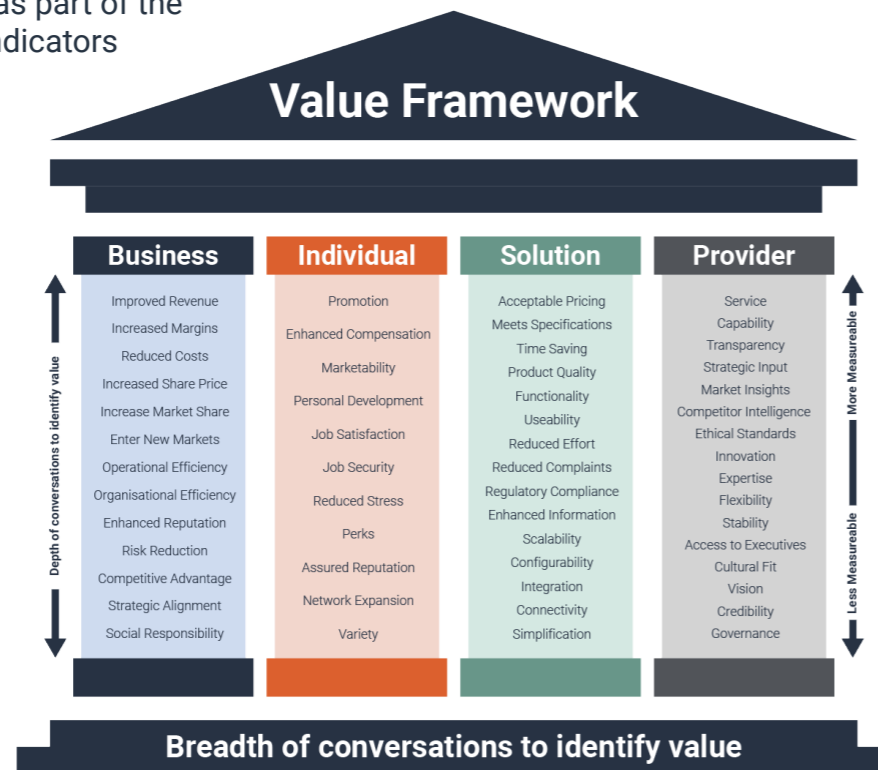


## Value Drivers

Value is complex. It needs to be explored and understood at multiple levels and it will vary for different client opportunities. Most often it is sought myopically and not holistically enough.

Value has been identified at business, individual, solution and provider levels with all stakeholders. Measurable indicators have been investigated and an appropriate hard metric has been developed as part of the business case. Subjective indicators have been qualified on a scale of 1-10, with 8, 9, and 10 being mission critical and worthy of addressing.

Leveraging the Revenue Framework in conjunction with our proprietary Value Framework will ensure we qualify harder and will enable us to better understand what our clients need (at business, individual, solution and provider levels), and most importantly what will motivate them to act.



## Economics

Where appropriate, the business case demonstrates a return on investment (ROI) or a cost of inaction (COI) that warrants investment. Budget has been qualified and confirmed, is adequate or within the required investment range, and meets our margin requirements. Broader economics of timescales (e.g. cost of delay) and availability of people and capacity outside are acceptable.

## Named Coach And Champion

A champion (advocate) works internally to promote the rationale for action and selecting us as a partner. An internal coach guides us, facilitates introductions and helps us understand where the power lies, the competitive landscape and where we should invest our time with stakeholders. Supporters are known and a contact plan exists to build support and manage resistors or adversaries.

## Understand Decision Dynamics

The steps of the client buying and decision process are understood (stages, decisions, timing, people and criteria). All key stakeholders have been identified, including their behavioural styles, and an engagement plan exists. A closing plan is being developed with the client to plot and manage daily/weekly activities to include procurement and contracting requirements through to signature.

## Exact Solution

The client has validated any assumptions and confirmed that the approach meets their needs and delivers expected value. The solution outlines the responsibilities of both parties, including onboarding or activation plans and risk mitigation. The client has confirmed their comfort with the commercial terms, including liabilities, payment terms and timing.

Much like two-factor security to keep you safe on the numerous apps and portals you use in your daily lives, we advocate the idea of two-factor qualification:

### From your client's perspective:

1. Should they do this?
2. Can they do this?
3. Will they do this?

### From your perspective:

1. Do we want it?
2. Can we win it?
3. Can we deliver it?

This means that you should **always** be qualifying **with** the client, and more importantly, you should never make a formal proposal to a client or prospect that is not fully qualified **on both sides**.

## Your Challenge

Your challenge in complex opportunities with multiple stakeholders is to continually qualify, and to qualify harder and earlier when the client might need you (as part of a formal procurement) but might not necessarily want you (to win).

## Further Reading

Click to read more insights from The Sales Coach Network

[Crucial Conversations](#)

[Methodical Or Haphazard](#)

[Where's The Value?](#)


[Sales Management Puzzle](#)

[Sales Success Is Systematic](#)

## Get In Touch

Is it worth us having a conversation to see whether or not we can help you and your team achieve more? [Email us today](#) and we will put you in touch with one of our experienced coaches.

## Get in Touch

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