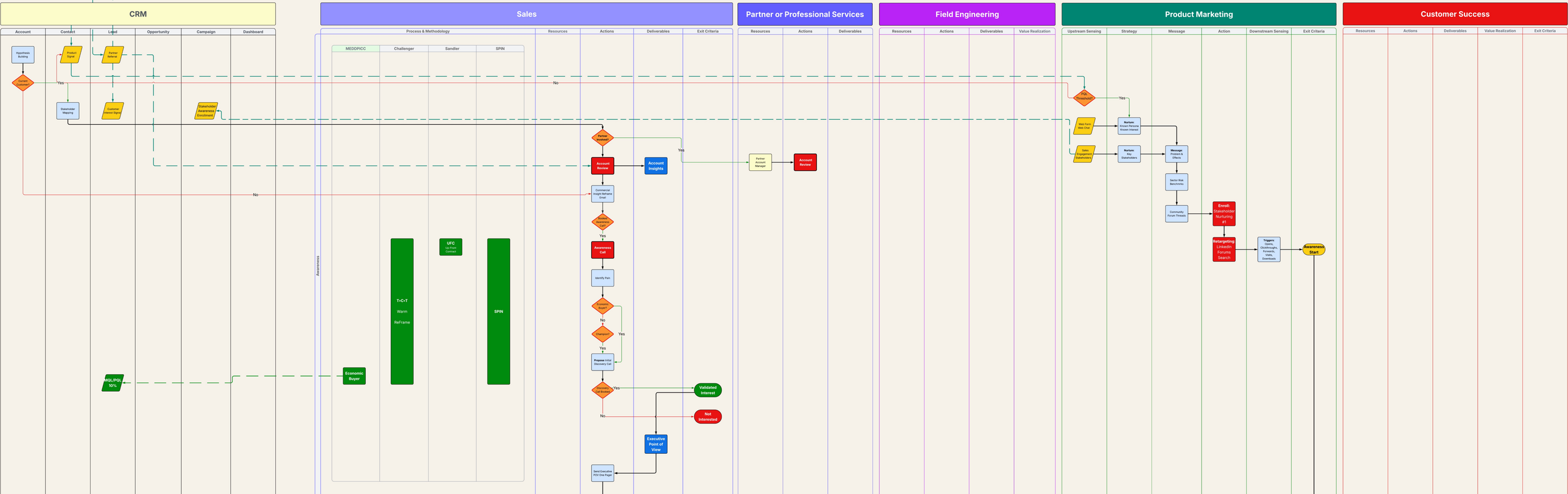
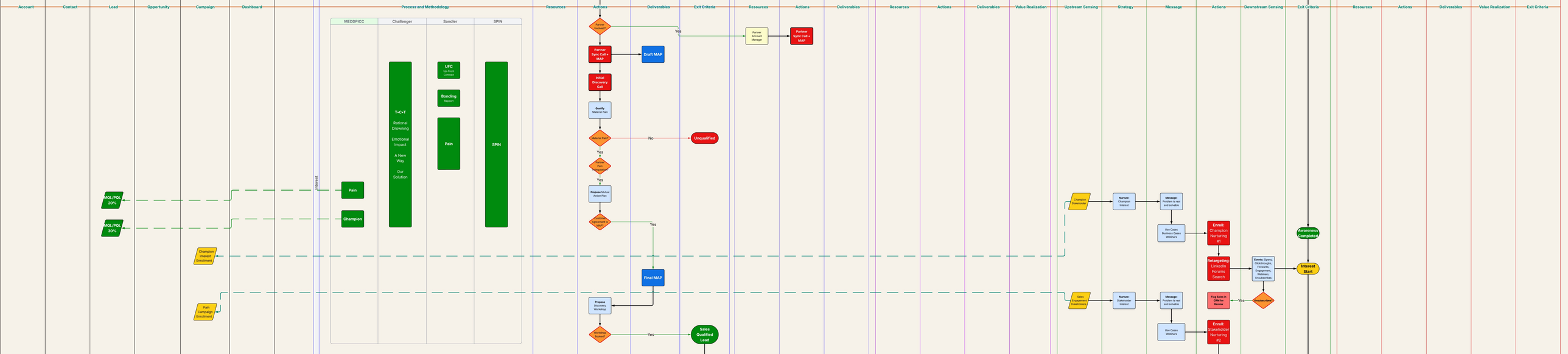
Product-Led Cross-Functional Sales, Marketing, Partner, and Delivery Process Flow


CRM
Sales
Partner or Professional Services
Field Engineering
Product Marketing
Customer Success
Account
Contact
Lead
Opportunity
Campaign
Dashboard
Process & Methodology
Resources
Actions
Deliverables
Exit Criteria
Value Realization
Upstream Sensing
Strategy
Message
Action
Downstream Sensing
MEDDPICC
Challenger
Sandler
SPIN
Hypothesis Building
Product Signal
Partner Referral
Qualified Customer?
Yes
No
Stakeholder Mapping
Customer Interest Signal
Stakeholder Awareness Enrollment
Partner Involved?
Account Review
Account Insights
Commercial Insight Reframe Email
Business Awareness Call
Awareness Call
Identify Pain
Economic Buyer?
Champion?
Propose Initial Discovery Call
Discovery Call Booked?
Validated Interest
Not Interested
Executive Point of View
Send Executive POV One Pager
Partner Account Manager
Account Review
MQL/PQL 10%
Awareness
Economic Buyer
T+C+T
Warm
ReFrame
UFC
Up-Front Contract
SPIN
PQL Threshold?
Web Form Web Chat
Sales Engagement /Stakeholders
Nurture: Known Persona Known Interest
Nurture: Key Stakeholders
Message: Problem & Effects
Sector Risk Benchmrks
Community Forum Threads
Enroll: Stakeholder Nurturing #1
Retargeting LinkedIn Forums Search
Triggers: Opens, Clickthroughs, Replies, Views, Downloads
Awareness Start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MEDDPICC
Challenger
Sandler
SPIN
Pain
Champion
T+C+T
Rational Drowning
Emotional Impact
A New Way
Our Solution
UFC
Up-Front Contract
Bonding
Aspirant
Pain
SPIN
Interest
MQL/PQL 20%
MQL/PQL 30%
Champion Interest Enrollment
Pain Campaign Enrollment
Partner Involved?
Yes
Partner Sync Call + MAP
Draft MAP
Initial Discovery Call
Qualify: Material Pain
Material Pain?
No
Unqualified
Yes
Champion Interest Qualified?
Yes
Propose Mutual Action Plan
Stakeholder Alignment Needed?
Yes
Final MAP
Propose Discovery Workshop
Workshop Booked?
Yes
Sales Qualified Lead
Partner Account Manager
Partner Sync Call + MAP
Champion Stakeholders
Nurture: Champion Interest
Message: Problem is real and solvable
Use Cases Business Cases Webinars
Enroll: Champion Nurturing #1
Retargeting Linkedin Forums Search
Events: Opens, Clickthroughs, Forwards, Engagement, Webinars, Unsubscribes
Unsubscribe?
Yes
Flag Sales in CRM for Review
Interest Start
Awareness Completed
Sales Engagement Stakeholders
Nurture: Stakeholder Interest
Message: Problem is real and solvable
Use Cases Webinars
Enroll: Stakeholder Nurturing #2

Account
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Exit Criteria
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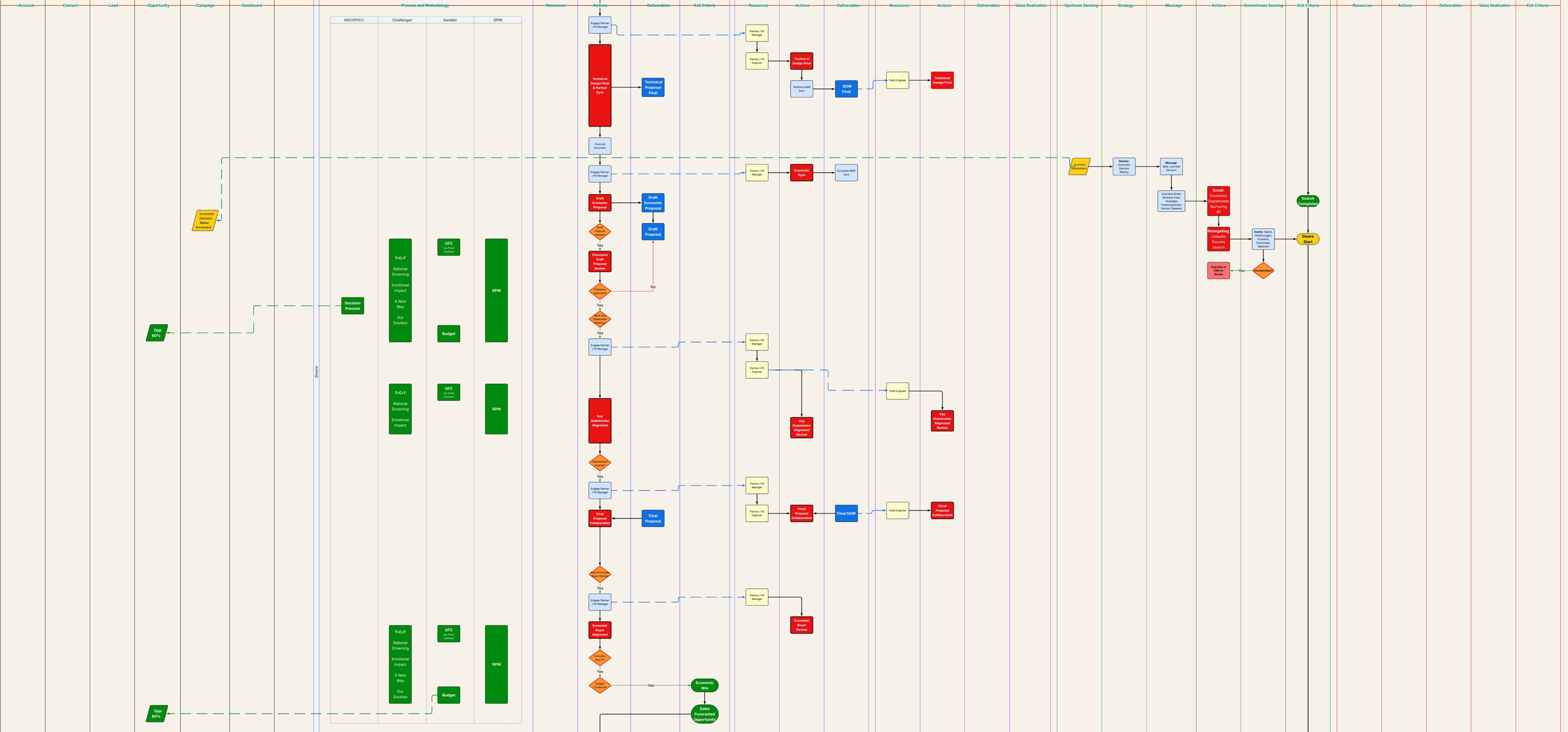
Value Realization
Exit Criteria
MEDDPICC
Challenger
Sandler
SPIN
Search
Stakeholder Search Enrollment
SQL 40%
Metrics
T+C+T
Rational Drowning
Emotional Impact
A New Way
Our Solution
UFC
Up-Front Contract
SPIN
Engage Partner / PS Manager
Sync Call
Account Insights Update
Key Stakeholder Map Update
Discovery Workshop Planning
Workshop Design & Collateral
Discovery Workshop
Resonance?
Objection Handling
Identify Blockers
Develop Counter-Strategy
Competitive Differentiator?
Compelling Event Identified?
Unique Capabilities?
Propose Decision Criteria and Process
Decision Criteria Agreed?
Process Agreed?
Budget Secured?
Unqualified
Qualified Opportunity
Partner / PS Manager
Partner / PS Engineer
Sync Call
Backchannel Material Pign Confirmation
Discovery Workshop Planning
Discovery Workshop
Sales Engagement Stakeholders
Nurture: Stakeholder Search
Message: How to choose the right solution
Buyer Guide ROI Calculator Competitive Matrix Partner Collateral
Retargeting: Linkedin Forums Search
Events: Opens, Clickthroughs, Forwards, Downloads, Webinars
Flag Sales in CRM for Review
Unsubscribes?
Yes
Enroll: Stakeholder Nurturing #3
Interest Completed
Search Start
Technical Search Enrollment
Opp 45%
Opp 50%
Competition
Decision Criteria
Fulfillment
Technical Draft & Partner/PS Sync
Technical Stakeholder Review
Technical Win
Technical Stakeholder
Nurture: Technical Search
Message: Enablement
Technical Documentation Performance Data
Enroll: Technical Stakeholder Nurturing #1
Technical Planning
Technical SOW Draft
Field Engineer
SOW Review
No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MEDDPICC
Challenger
Sandler
SPIN
Desire
Economic Decision Maker Enrollment
Opp 60%
Decision Process
T-C-T
Rational Drowning
Emotional Impact
A New Way
Our Solution
UFC
Up-Front Contract
Budget
SPIN
T-C-T
Rational Drowning
Emotional Impact
UFC
Up-Front Contract
SPIN
T-C-T
Rational Drowning
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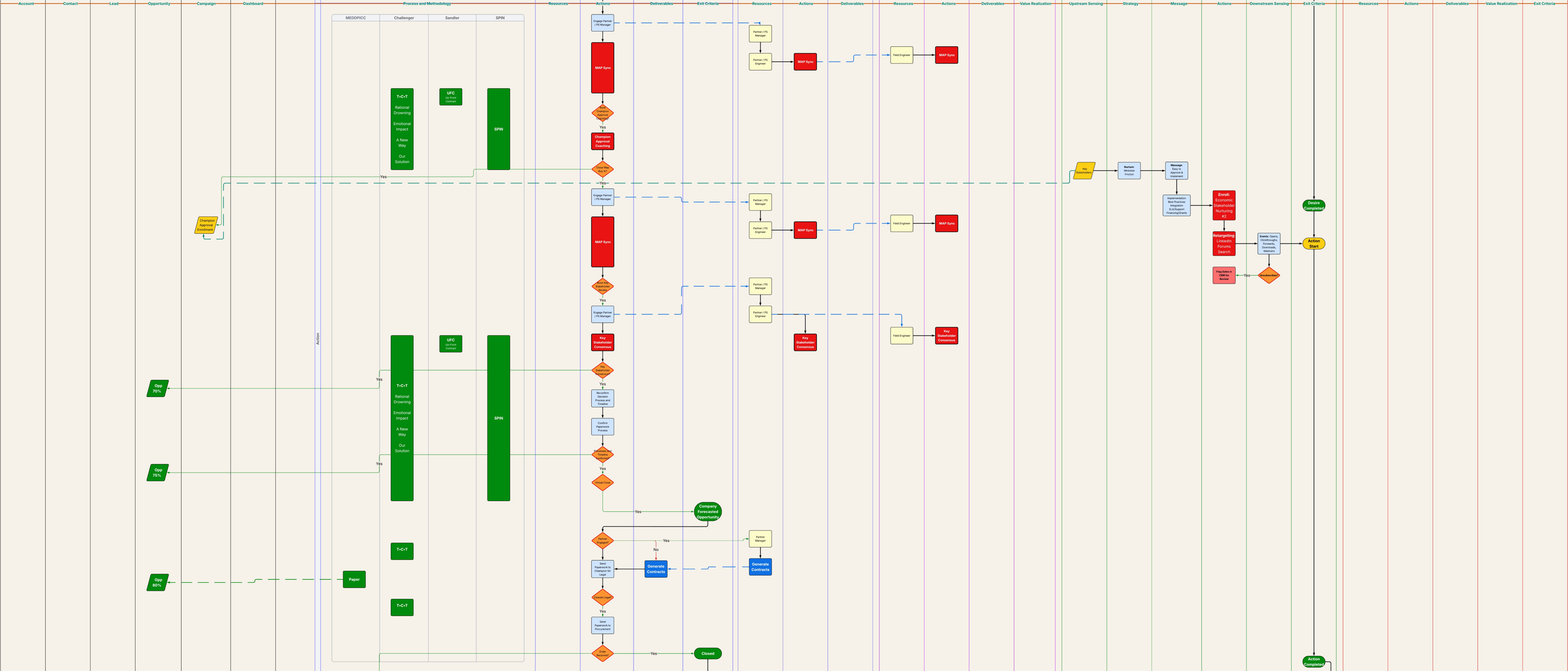
A New Way
Our Solution
UFC
Up-Front Contract
Budget
SPIN
Opp 60%
Engage Partner / PS Manager
Technical Design Final & Partner Sync
Technical Proposal Final
Financial Discovery
Engage Partner / PS Manager
Draft Economic Proposal
Draft Economic Proposal
Draft Proposal
Draft Proposal Approved?
Yes
Champion Draft Proposal Review
Champion Alignment?
No
Yes
Have Key Stakeholder?
Yes
Engage Partner / PS Manager
Key Stakeholder Alignment
Stakeholder Aligned?
Yes
Engage Partner / PS Manager
Final Proposal Collaboration
Final Proposal
Have Economic Buyer Review
Yes
Engage Partner / PS Manager
Economic Buyer Alignment
Economic Buyer Aligned?
Yes
Budget Confirmed?
Yes
Economic Win
Sales Forecasted Opportunity
Partner / PS Manager
Partner / PS Engineer
Technical Design Final
Technical MAP Sync
SOW Final
Field Engineer
Technical Design Final
Partner / PS Manager
Economic Sync
Economic MAP Sync
Partner / PS Manager
Partner / PS Engineer
Field Engineer
Key Stakeholder Alignment Review
Key Stakeholder Alignment Review
Partner / PS Manager
Partner / PS Engineer
Final Proposal Collaboration
Final SOW
Field Engineer
Final Proposal Collaboration
Partner / PS Manager
Economic Buyer Review
Economic Stakeholder
Nurture: Economic Decision Making
Message: Safe, Low Risk Decision
Executive Briefs Business Case Templates Financing/Grants Partner Collateral
Enroll: Economic Stakeholder Nurturing #1
Retargeting Linkedin Forums Search
Events: Opens, Clickthroughs, Forwards, Downloads, Webinars
Should we Reach?
Yes
Flag Sales in CRM for Review
Search Completed
Desire Start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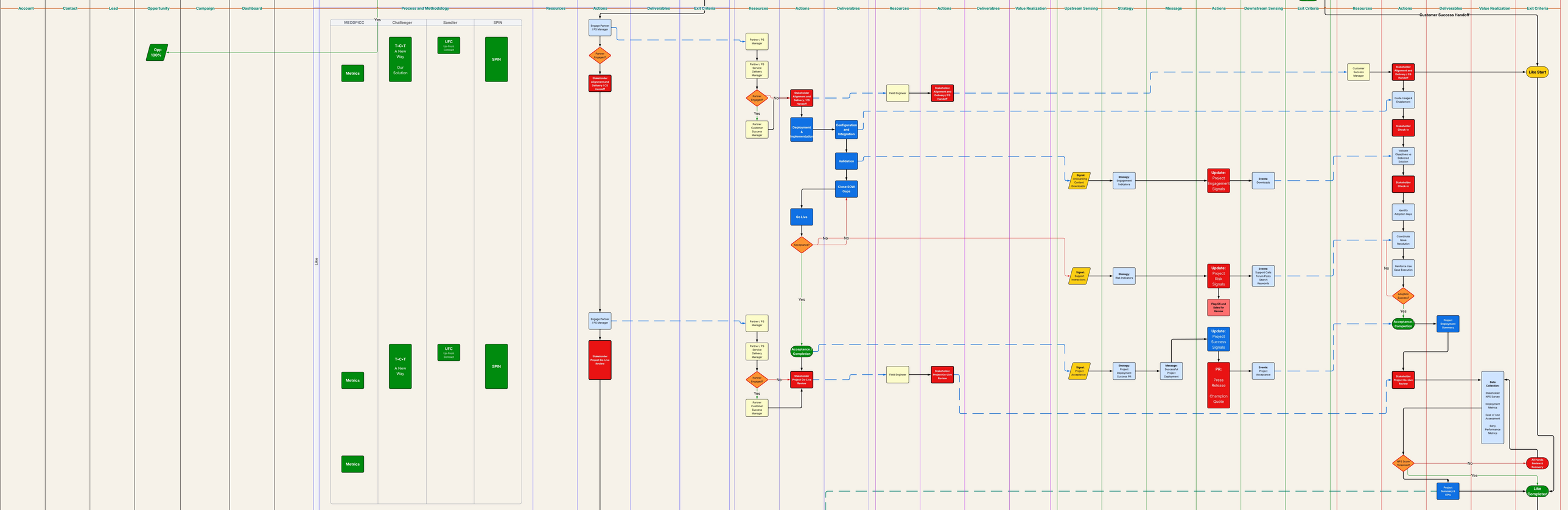
MEDDPICC
Challenger
Sandler
SPIN
Action
Engage Partner / PS Manager
MAP Sync
Champion Approval Coaching
Close Man Buy-In
Key Stakeholder Consensus
Key Stakeholder Approval
Reconfirm Process and Timeline
Confirm Paperwork Process
Paperwork and Timeline Approval
Virtual Close
Partner Engaged
Send Paperwork to Champion for Legal
Closed Legal
Send Paperwork to Procurement
Order Received
Yes
No
Partner / PS Manager
Partner / PS Engineer
Field Engineer
Key Stakeholder Consensus
Generate Contracts
Company Forecasted Opportunity
Closed
T+C+T
Rational Drowning
Emotional Impact
A New Way
Our Solution
UFC
Up-Front Contract
SPIN
Paper
Opp 70%
Opp 75%
Opp 80%
Champion Approval Enrollment
Key Stakeholders
Nurture: Minimize Friction
Message: Easy to Approve & Implement
Implementation Best Practices Integration SLA/Support Financing/Grants
Enroll: Economic Stakeholder Nurturing #2
Retargeting: LinkedIn Forums Search
Events: Opens, Clickthroughs, Forwards, Downloads, Webinars
Flag Sales in CRM for Review
Unsubscribes?
Desire Completed
Action Start
Action Completed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Message
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Exit Criteria
Resources
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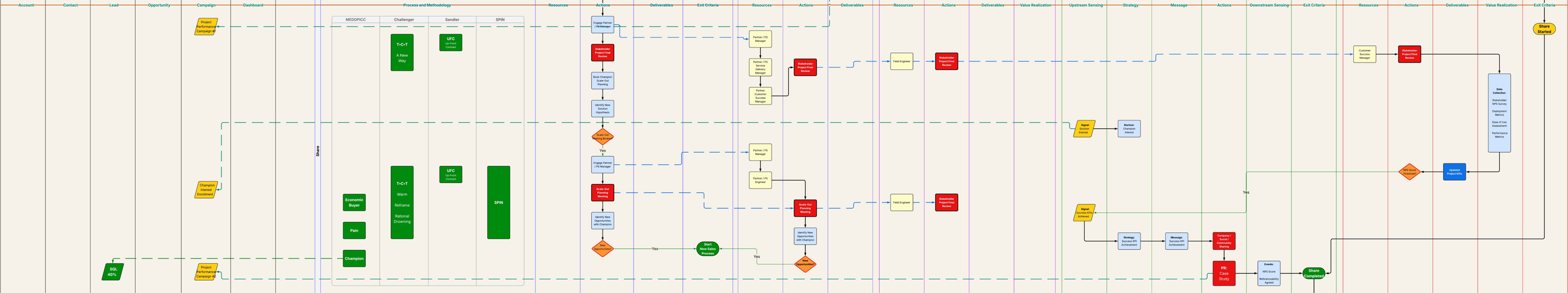
Value Realization
Exit Criteria
Customer Success Handoff
Like
Opp 100%
Yes
MEDDPICC
Challenger
Sandler
SPIN
Metrics
T+C+T
A New Way
Our Solution
UFC
Up-Front Contract
SPIN
Metrics
T+C+T
A New Way
UFC
Up-Front Contract
SPIN
Metrics
Engage Partner / PS Manager
Partner Engaged?
Stakeholder Alignment and Delivery / CS Handoff
Engage Partner / PS Manager
Stakeholder Project Go-Live Review
Partner / PS Manager
Partner / PS Service Delivery Manager
Partner Engaged?
No
Yes
Partner Customer Success Manager
Stakeholder Alignment and Delivery / CS Handoff
Deployment & Implementation
Configuration and Integration
Validation
Close SOW Gaps
Go Live
Acceptance?
No
No
Yes
Acceptance / Completion
Partner / PS Manager
Partner / PS Service Delivery Manager
Partner Engaged?
No
Yes
Partner Customer Success Manager
Stakeholder Project Go-Live Review
Field Engineer
Stakeholder Alignment and Delivery / CS Handoff
Field Engineer
Stakeholder Project Go-Live Review
Signal: Onboarding Content Downloads
Signal: Support Interactions
Signal: Project Acceptance
Strategy: Engagement Indicators
Strategy: Risk Indicators
Strategy: Project Deployment Success PR
Message: Successful Project Deployment
Update: Project Engagement Signals
Update: Project Risk Signals
Flag CS and Sales for Review
Update: Project Success Signals
PR: Press Release Champion Quote
Events: Downloads
Events: Support Calls Forum Posts Search Keywords
Events: Project Acceptance
Customer Success Manager
Stakeholder Alignment and Delivery / CS Handoff
Like Start
Quote Usage & Enablement
Stakeholder Check-In
Validate Objectives vs Delivered Solution
Stakeholder Check-In
Identify Adoption Gaps
Coordinate Issue Resolution
Reinforce Use Case Execution
No
Adoption Success?
Yes
Acceptance / Completion
Project Deployment Summary
Stakeholder Project Go-Live Review
Data Collection:
Stakeholder NPS Survey
Deployment Metrics
Ease of Use Assessment
Early Performance Metrics
NPS Score Threshold
No
Yes
CS Deep Review & Recovery
Project Summary & KPIs
Like Completed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Share
MEDDPICC
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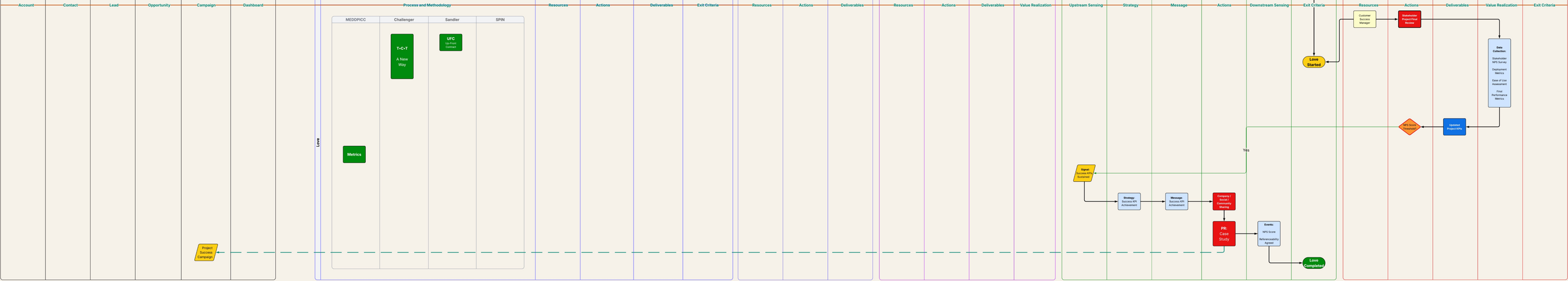
Sandler
SPIN
Project Performance Campaign #1
Champion Interest Enrollment
Project Performance Campaign #2
SQL 40%
Economic Buyer
Pain
Champion
T+C+T
A New Way
T+C+T
Warm
Reframe
Rational Drowning
UFC
Up-Front Contract
UFC
Up-Front Contract
SPIN
Engage Partner / PS Manager
Stakeholder Project Final Review
Book Champion Scale-Out Planning
Identify New Solution Hypothesis
Scale-Out Planning Booked?
Yes
Engage Partner / PS Manager
Scale-Out Planning Meeting
Identify New Opportunities with Champion
New Opportunities?
Yes
Start New Sales Process
Yes
Partner / PS Manager
Partner / PS Service Delivery Manager
Partner Customer Success Manager
Stakeholder Project Final Review
Partner / PS Manager
Partner / PS Engineer
Scale-Out Planning Meeting
Identify New Opportunities with Champion
New Opportunities?
Field Engineer
Stakeholder Project Final Review
Field Engineer
Stakeholder Project Final Review
Signal: Solution Interest
Nurture: Champion Interest
Signal: Success KPI Achieved
Strategy: Success KPI Achievement
Message: Success KPI Achievement
Company / Social / Community Sharing
PR: Case Study
Events:
NPS Score
References/Willingness Agreed
Share Completed
Yes
Customer Success Manager
Stakeholder Project Final Review
Data Collection
Stakeholder NPS Survey
Deployment Metrics
Ease of Use Assessment
Performance Metrics
NPS Score Breakdown
Update/ Project KPIs
Share Started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Final Performance Metrics
Love Started
NPS Score Tracking
Updated Project KPIs
Yes
Signal: Success KPI Sustained
Strategy: Success KPI Achievement
Message: Success KPI Achievement
Company / Customer / Community Sharing
PR: Case Study
Events:
NPS Score
Referenceability Agreed
Love Completed