

The Book of

SALES METHODOLOGIES

Win more deals by asking the right questions!

JANIS ZECH

The Book of Sales Methodologies

By Janis Zech

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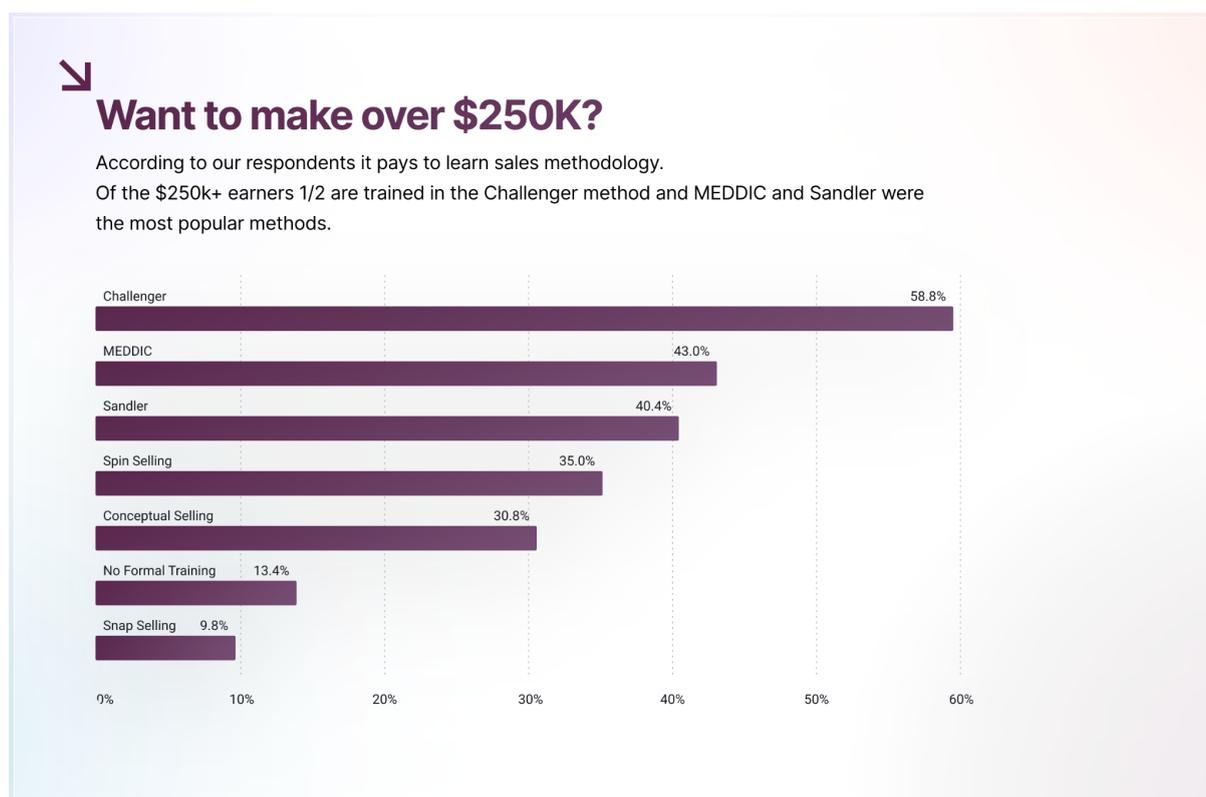
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Introduction

Sales methodologies are used by sales teams all over the world to help them close more deals. They give you a framework or structure that allows you to put together your own set of questions for prospects which will lead them down the path towards converting into customers.



Source: [Bravado's Sales Stats](#)

But how do you choose between all of the different sales methodologies out there?

There are lots of different approaches to selling, and each one has its own strengths and weaknesses. Some methods are better for some kinds of products than others; some are better for one type of buyer than others. Some methods force you to focus on one aspect of the sale at a time, while others encourage you to think about everything at once.

But don't worry! We've done all the research for you and put together a book of some of our favorite sales methodologies so that no matter what your situation is or what kind of product or clientele you're dealing with, we can help you find something that works for YOU.

In this book, we're going to cover seven of the most popular sales methodologies like MEDDIC, SPICED, SNAP & Challenger Sales and how they can be applied in practice to create your own set of questions to ask a prospect, increase close rate, and exceed your team's quotas!

Each chapter will focus on one methodology and it will have a breakdown of what it's about, what it does and when you should use it. At the end of every chapter, we'll share a worksheet and examples of how you could apply these methodologies in sales calls so that you can see exactly how they would work out in practice.

One of the most common challenges is getting sales reps to close more deals. This book was written with exactly this goal in mind: how to help sales reps win more deals by using specific methodologies in a way that benefits both them and the company.

Cheers,

Janis, co-founder of [Weflow](#) - update Salesforce fast.

Chapter 1: MEDDIC

The MEDDIC sales process is a B2B sales qualification methodology. Its main purpose is narrowing down the leads with the highest chance of becoming paying customers (aka. qualified leads), so your sales team can spend their time and effort most efficiently.

The idea is that better-qualified leads = higher closing rate = increased sales success.

Which makes sense, considering [67% of lost sales](#) are a result of sales reps not properly qualifying leads before taking them through the full sales process.

And [statistics](#) show that growth rates of over 30% in saturated markets and over 250% in startups are possible with the MEDDIC methodology.

What is the MEDDIC sales process?

MEDDIC is an acronym for the six steps in this sales qualification methodology:

1. Metrics
2. Economic buyer
3. Decision criteria
4. Decision process
5. Identify pain
6. Champion

 Fun fact: The MEDDIC sales process was created in the 90s by [PTC](#), a software company renowned in the SaaS industry for its strong sales culture. Using MEDDIC, PTC tripled its sales [from \\$300 million to \\$1 billion](#) in just four years.

Step 1: Quantify the economic benefit to the lead with Metrics

You can't sell something to someone until you understand what they expect to gain if they buy it. And while you can list product features till you're blue in the face, nothing's going to drive your solution home like numbers will.

Metrics give leads something quantifiable to entice them with. So hit them with an impressive ROI stat or a time savings promise of X many hours a workweek as a result of your solution.

But first, you've got to ask them the right questions.

Questions to ask:

- *What are your business goals right now?*
- *Which metrics around cost, efficiency or business do you need to achieve?*
- *How would you measure success?*

Step 2: Find the decision-maker, aka. the Economic buyer

The "economic buyer" is the one who will ultimately decide if your product or service is worth buying for the company you're trying to sell to.

Your mission is to deliver your sales pitch to this person.

A bit of detective work on a company's website or LinkedIn will help you find out who the economic buyer is. Hint: As the name implies, they're the person responsible for any economic profit or loss that may happen as a result of your solution. So if you're [selling SEO services](#), for example, you're probably looking for the head of content or growth marketing.

Once you've found them (or think you have), reach out. Their answers to the below questions will let you know whether you've connected with the right person. Otherwise, they should help point you in the right direction.

Questions to ask:

- *Are you sponsoring this project?*
- *What do you need to take this project to the finish line?*
- *Is anyone else involved in making the final decision?*

Step 3: Understand the lead's Decision criteria

When talking to a lead, very rarely are you their only option. More likely, your competitors are targeting them at the same time, or the lead is still considering other vendors offering similar or alternative solutions.

That's why it's so important to understand the lead's decision-making and purchasing process—what are their technical and business criteria?

Technical decision criteria

Technical decision criteria are based on whether your solution fits into the prospective organization's existing infrastructure.

For example, if you're a SaaS company, does your software integrate with their current tech stack? If not, go ahead and disqualify this company as a potential customer (unless an entire tech overhaul is in order, then that's a whole other story).

Business decision criteria

Business decision criteria depend on factors like whether the prospective organization has a predetermined budget for your solution and what the desired ROI is.

For example, the lead might be actively looking for a product like yours, so they've already allocated a set budget for it.

On the other hand, they might've not put aside money for it but have the flexibility to fit it into their budget if you can prove your solution's worth it—you can work with that too.

Or they may simply not be able to afford you right now. That's cool too. Disqualified.

Questions to ask:

- *What are the most important criteria for you when making this decision?*
- *How are you calculating the ROI for this project to justify the investment?*

Step 4: Find out the lead's Decision process

So you've checked off the first D in MEDDIC—the decision criteria. Then what happens?

It's time to figure out the lead's process in making the final purchase decision.

The decision process can be split into three routes: Technical Decision Making, Business Decision Making, and the Paper Process. Each with its own set of questions including but not limited to...

Technical decision making

- *What is the process to make a technical decision?*
- *Who is involved and what are the steps to make a final decision?*

Business decision making

- *What is the process to make a financial decision?*
- *How is this purchase prioritized and what timeline is it based on?*
- *Is there anyone else that needs to be involved for approval? If yes, who and how long does it normally take for them to decide?*

Paper process

- *What is the process to get the paperwork completed?*
- *What is the legal review process on your end?*

Step 5: Identify pain and how your product or service can help

To deliver an effective sales pitch, you need to identify how your product or service can solve a problem the prospective business is facing. Some examples of common business problems are high costs, employee turnover, and production delays.

By presenting a clear cost-benefit analysis to your lead, you can show them exactly what benefits they'll gain by going with your solution—and what'll happen if they don't.

The difference between a strong and weak sales angle here is *specificity*.

For example, say the lead's pain is their business, ABC Company, isn't operating as cost-effectively as it could be. Tell them exactly how much they're losing a year without your solution versus how much they could be saving with it.

A strong angle: ABC Company needs to deliver X project by end of year, but they're having some technical issues that are causing major delays. It may not be done in time, in which case they'll incur a \$50K fine. Your product can solve these technical issues and ensure on-time delivery, saving their reputation and a hefty penalty.

A weak angle: ABC Company is working on a project but is experiencing technical issues.

The difference is in the details.

Questions to ask:

- *What challenges are you currently facing?*

- *What are the implications of those challenges?*
- *What happens if you do nothing?*

Step 6: Connect with a Champion to vouch for your solution

If your product truly is a good fit for the company you're trying to sell it to, there'll always be someone there who sees it. Get that person on your team—they're the "champion" in your MEDDIC framework.

The champion is usually the person most affected by the pain you identified in the previous step, meaning they also have the most to gain from what you're offering. Just think of them as your wingman, helping you close the deal by selling the product on your behalf.

For example, say you're selling a contact center solution. Your champion could be a senior sales rep who has a fair amount of persuasive power with the exec team. This rep recognizes that your product is going to improve things for their team, and ultimately the company they work for, and will therefore be motivated to help you sell it to them.

Your champion can give you a lay of the land with details you wouldn't be able to find yourself, like who you should be approaching and how, information about their customer base or the current length of their sales cycle—all details you can use to fine-tune a sales pitch. They might even help you set up a meeting with the right people. (Thanks, wingman!)

Questions to ask (when assessing a champion):

- *What does this person have to gain?*
- *Does this person have influence with decision-makers?*
- *Can they accurately explain your product's benefits to the company?*

Once you've got all six steps down, it's time to bring that deal home. 💰

The MEDDIC sales process empowers your sales team to truly understand the difference between any old lead and a potential customer. And properly qualify them accordingly. Meaning more time spent on closing deals (use our [free sales quota calculator](#)) that are most likely to close. Wins all around.

MEDDIC Questions Worksheet

Fill out this worksheet to formulate your own MEDDIC questions.

Step	Goal	Questions to Ask
Metrics	Quantify the impact of the solution you're providing.	
Economic buyer	Find the decision-maker.	
Decision criteria	Understand what the lead is basing their decision on.	
Decision process	Figure out the final decision-making process.	
Identify pain	Identify the challenges the lead is currently facing and how your solution can help.	
Champion	Connect with an influential employee at the prospective company to vouch for your solution.	

Chapter 2: CHALLENGER Sales

Common advice for today's sales professionals typically sounds something like this: *"Put the customer first."* *"Let your prospect control the pace of conversation."* *"Listen to what your lead needs, then make recommendations."*

Our current sales environment revolves around relationship-building, customer-centricity, and viewing sales as a consulting role rather than a revenue-building stream. It assumes the customer doesn't want to hear a sales pitch and would rather have a supportive resource willing to lay out all their options – even their competitors.

And while this kind of sales methodology has its place in the business world, relationship-building isn't a golden ticket to success. It's time consuming, emotionally taxing, and doesn't guarantee a payout. For top-performing sales reps, in particular, customer-centric selling could actually make selling *harder*.

In situations like these, the challenger sales model could be the key to unlocking a more efficient sales process.

What is the Challenger Sales Model?

In their book *The Challenger Sale*, Brent Adamson and Matthew Dixon outline five types of sales reps:

- The Hard Worker. Driven, self-motivated, and always looking for ways to improve.
- The Lone Wolf. High-performer, confident, but not necessarily a team player.
- The Relationship Builder. Patient, people-first, positions themselves as an advocate for their prospect.
- The Problem Solver. Focused on finding solutions and solving problems.

And finally...

- The Challenger. Takes control of the conversation, doesn't shy away from uncomfortable talking points, and focuses on teaching the prospect.

The Challenger recognizes that their prospect might not always know the best option for them and pushes them to think about their challenges or opportunities from a different

perspective. They're ready to (respectfully) go toe-to-toe with the prospect and won't shy away from a productive debate.

Challengers are typically high-performing sales reps with deep knowledge about their prospects, industry, challenges, and opportunities. They're able to find flaws in their prospect's way of thinking and challenge their assumptions or beliefs in ways that are educational and insightful.

The best way to understand the Challenger sales type is to compare it to the Relationship Builder (the rep type most of today's sales tactics are geared toward). In both instances, the rep assumes the customer is capable of doing their own research and coming to their own conclusions about what kind of product or solution they need.

But where the Relationship Builder wants to position themselves as a consultant, advocate, and source of support for the prospect – someone to answer the questions the prospect comes up with throughout their research – the Challenger wants to push them to get out of their comfort zone and recognize where their research might be flawed. The Challenger is still a source of knowledge and support, but steers far away from becoming a “yes man.”

When to use a Challenger Sales Process?

A Challenger sales process works best in complex sales environments when prospects may feel particularly overwhelmed or confused about their options. In fact, the Challenger sales method had a [54% chance of success](#) when used in complex sales.

But adopting a Challenger sales process can be difficult. Because the methodology is aggressive and contentious in nature, implementing it in a way that is still respectful and supportive can be a delicate balance that is hard for sales reps to find. If reps push too hard, come across as arrogant, or don't know when to back down, it could tarnish their (and the company's) reputation.

For a Challenger sales process to be successful, reps need to be experts in their industry, know their prospects' business inside and out, and know how to present solutions that are educational, informative, and insightful.

How to Create a Challenger Sales Process

Creating a Challenger sales process is actually pretty simple. Here are five steps that with the right practice can help your sales reps close more complex sales.

1. Warm Up: Get to know the business

The very foundation of the Challenger sales model is to debate. In order to do so effectively, the sales rep needs to be well versed in the challenges and opportunities facing their prospects' industry.

Where other methodologies let sales reps get away with a quick Google search or LinkedIn scan before making a phone call, the Challenger method requires reps to know all the ins and outs of the industry or business so they can find loopholes in their prospects' way of thinking.

Sales reps who specialize in particular businesses or industries will do best with a Challenger sales methodology because they can really dig deep into the problems their potential customers are facing.

Here are some ways to develop a deeper industry understanding:

- Customer conversations. Every time you talk to a customer or prospective buyer, listen closely to the pain points they mention. It's likely those issues are felt across the entire industry.
- Industry publications. Get your information from the same sources as your prospects. Subscribe to popular industry publications and follow industry leaders on your professional social media pages.
- Competitor materials. Know what resources and information your prospects are probably reading. Check out case studies, ebooks, and other sales materials your competitors are providing so you know what talking points you might need to debate.

By the end of this step, sales reps should have a thorough understanding of their prospect's challenges and what solutions they believe will solve them.

2. Reframe: Find a new perspective

The next step of the Challenger sales methodology is to encourage the prospect to think about their problem or challenge through a new lens. In other words, it's time to reframe the problem.

Here's an example.

Let's say that during the warm up phase of the process, you learned that a prospect is struggling to scale their business. They've concluded that in order to grow more efficiently, they need better project management software to keep track of all their moving pieces and ensure nothing slips through the cracks.

But based on your experience working with similar customers and your knowledge of the industry, you know the prospect's actual problem isn't with getting things done on time — it's that they need to get more done in less time. They don't actually need a project management system, they need automation.

During the reframing phase, you'd explain the flaws in the prospect's logic and show them why automation is actually a better solution. Your goal isn't to sell a specific product (that will come later), but rather to get the prospect thinking about the solution in a new way.

Use data and evidence to back up your claims and avoid giving a product pitch. The prospect should feel like they're being shown a new way of doing things — not like they need to buy your particular product to get the outcome you're promising.

Here is one way you could reframe this situation to your prospect:

“Properly managing your projects and tasks is a great way to stay organized, but it will only marginally improve your team's productivity if they're already operating at their max. I can show you some examples of companies that still struggled with scaling even with proper systems and management in place.”

3. Connect: Use emotions to build personal value

While we like to think sales are all about logic and data, making purchasing decisions is actually quite emotional. Empathy goes a long way when trying to close a deal.

At this stage, it's all about making an emotional connection with your prospect — connecting beyond the data and facts.

Using the same example situation as the last phase, that conversation might look like this...

“Scaling a business puts a tremendous amount of stress on you and your team. Properly organizing and managing the many moving

parts of your business's growth can relieve some of that pressure, but without additional support, your team is at risk of burning out.

This happens to a lot of companies when they reach the stage you're at — they focus so much on their bottom line that they forget to take care of the people working for them. If your team starts to feel overwhelmed or unhappy in their roles, you risk losing really great people.

Improving organization and project management will only do so much. To truly scale efficiently, you need something more.”

Your goal is to make as much of an emotional impact as possible, but try to do so in a way that connects back to your prospect's initial challenge. For example, if they're concerned about their budget, try to paint a picture of what they'll be able to do with the money they save. Or, if security is their biggest worry, explain the consequences of not taking enough caution with their data.

4. Imagine the Future: Selling the value proposition

Up until this point, the goal has been to get the prospect to see their challenge the same way you do. Now you're ready to dive into how they should *actually* solve their problem. While we're still not ready to pitch your product, you want to start painting a picture of what their future could look like if they listen to your advice.

Here's what that conversation would look like using our example:

“You need a solution that helps your team get more done in less time. If you're able to take some of those repetitive, boring tasks off your team's plate, they can stay focused on the work they enjoy doing — so even as you grow, your team stays engaged and fulfilled. And you can do this without hiring additional team members!”

Think about selling the solution of your product rather than the product itself. What benefits will your prospect realize if they choose to buy from you?

The idea is to get the prospect to buy into the outcome first. When they can envision themselves in an idealistic future, they'll be more open to hearing your product pitch — meaning the overall conversation can flow with less resistance.

5. Pitch: Showcasing the product

The final step is the sales pitch. While this step is pretty straightforward, you want to make sure you're tying the offer back to the points you've already discussed up to this point.

Here's an example:

“You need a solution that does more than just manage the little tasks your team needs to complete. You need a way to automate them. By streamlining the repetitive or boring tasks on your team’s plate, you free them up to focus on the work they actually like.

Projects flow more smoothly, you can keep your staff at its existing level, and you can improve their job satisfaction. On top of all of that, you can increase productivity and your bottom line. Scaling will become much more efficient.

With our automation software, you can easily create your own automations and integrations without coding experience.”

This is a great opportunity to offer a free trial, product demo, or other walkthrough of what you're offering.

Closing Complex Sales with the Challenger Sales Model

When used correctly, the Challenge sales model is a way to stand out. While other sales reps are focusing on the long game, this methodology gives sales reps an opportunity to take control back in their hands and have meaningful, productive conversations – especially when it comes to complex sales processes.

This method of selling does take practice, but don't let it intimidate you. With the right research and a solid understanding of the industry your prospects work in, it can turn good sales reps into great sales reps.

Challenger Sales Questions Worksheet

Fill out this worksheet to formulate your own Challenger sales questions.

Phase	Goal	Questions to Ask
Warm Up	<ul style="list-style-type: none">• Get to know the business• Discover the solutions your prospect is considering• Develop your talking points	
Reframe	<ul style="list-style-type: none">• Show a new perspective• Point out flaws in logic• Highlight areas your prospect might be missing	
Connect	<ul style="list-style-type: none">• Use emotions to build connections• Paint a picture of what could happen if they ignore your perspective	
Imagine the Future	<ul style="list-style-type: none">• Sell the value proposition• Show what their life could look like with your product	
Pitch	<ul style="list-style-type: none">• Sell your product	

Chapter 3: Sandler Sales System

The Sandler Selling System is a sales methodology focused on matching the right buyer with the right solution.

It helps sales teams prioritize the right leads and win deals through human connections and problem-solving.

Done right, convinces prospects the deal was actually their idea. It's particularly effective for building strong relationships with clients.

What's more, Sandler stands to save reps and buyers a ton of time by surfacing deal-breakers early in the game. So—sellers can spend their time working the most valuable deals in the pipeline, while unqualified prospects aren't stuck dodging calls until they either switch jobs or retire.

In this article, we'll cover the what and why of the Sandler Sales System, walk you through the seven-step process, and explain how to work Sandler into your current strategy.

What is the Sandler Selling System?

The Sandler sales methodology was created by David Sandler in 1967. It's a consultative strategy that emphasizes soft skills like relationship-building and lead qualification over pushy closing tactics—recasting the seller as a "trusted advisor."

No mind games, manipulation, or high-pressure closing tactics.

Compared to traditional sales methodologies, which tend to focus on closing as many deals as possible in the least amount of time—at any cost, the Sandler system is all about mutual trust and commitment between buyer and seller.

So, the system breaks the sales process into three stages:

- Building & sustaining relationships. The first stage involves building rapport with a prospect, gathering requirements, and establishing expectations for what the each stage of the sales process should look like.
- Qualifying the opportunity. The second stage focuses on fit. Does your solution solve buyer needs? Ease pain points? Can the prospect afford it?

- Closing the deal. The last stage focuses on presenting a solution, going in for the close, and nailing the post-close follow-up to set the stage for a lasting relationship.

Those three stages break into seven steps, which are represented as “compartments” in the Sandler Submarine.



[Source](#)

Per [the official website](#), David Sandler chose the submarine as a symbol as an homage to his favorite World War II movies—but also because:

- Professional sales reps (aka Sandler-trained reps), like submarines, are stealthy. They run silent and deep, taking care of business beneath the surface.
- By contrast, traditional salespeople are more like "traditional battleships." They make their presence known by advertising their intentions. They're loud, aggressive, and everyone can see what they're up to.
- When submarines are attacked during combat, the crew moves through each area, securing the previous compartment before moving to the next to avoid flooding. The Sandler methodology takes a similar approach to ensure reps arrive safely at the close. Each step must be completed before the next can begin, so disqualifying factors don't "spill" into the next compartment and derail the deal.

How to implement the seven steps of the Sandler Selling System

To give you an idea of how this methodology works "IRL," let's look at the seven Sandler sales process steps—and what each of those steps entails.

But—before we get started, it’s worth noting that you can’t just “paste” the Sandler system on top of the existing sales processes without making a few tweaks.

It’s better to focus instead on using the Sandler sales method rules as more of a flexible template than a strict set of guidelines. It’s also a good idea to consider how Sandler might be used alongside other methodologies like [MEDDIC](#) or [SPICED](#)—depending on who you’re talking to or where they’re at in the buyer’s journey.

1. Build rapport

The first step in the Sandler system is to start building a relationship with your prospect. This phase is important because it helps build trust – but also because it helps you understand your prospect.

Before getting started, make sure you can answer the following questions:

- Who are you?
- What is your goal?
- What’s your plan for achieving that goal?
- What does your solution bring to the table?
- Who does your solution help?
- Who is the prospect?
- What are their goals?
- What’s their role within their organization?
- Who else is involved in the decision making process?

David Sandler envisioned this stage as an initial discovery mission. It’s not about using anecdotes and introductory statements (i.e.: “oh, my best friend from college grew up there, too.”) to establish a connection.

It’s really about asking questions that will help you understand your prospect better, as well as increase the chances of closing by addressing problems or concerns early on.

Now, small talk and personal anecdotes have their place—and can be used throughout the sales process. But, those types of interactions typically take place after the sales rep has qualified their prospect.

Questions to ask:

- *What were you hoping I could help you with?*
- *What motivated you to take this call with me?*
- *When did you first decide to look into solutions for X problem?*
- *What are one or two things you don't like about your current solution?*
- *What are your concerns about changing solution providers?*
- *What should we know about your business in order to put together the right solution/terms/plan?*
- *Has anything changed since the last time we last spoke?*
- *Is there anything I haven't covered you'd like to know more about?*

2. Upfront contracts

Step two is "upfront contracts," or UFC, which in this context, means setting expectations. This step focuses on establishing ground rules and creating a positive, comfortable space for conducting business. Essentially, it's about mutual trust.

Per the Sandler method, upfront contracts should always include the following five components:

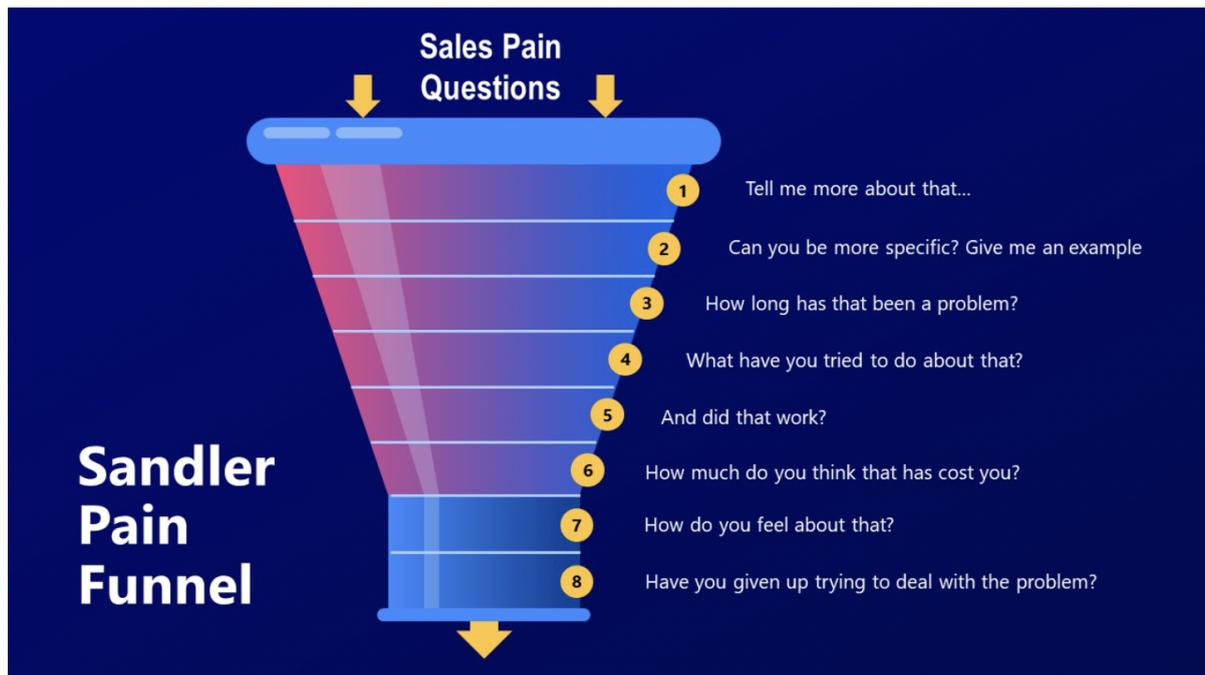
- **Objective.** Share your goal with the prospect—what is the purpose of the meeting, what do you hope the prospect will gain from this interaction? Ask the prospect what they're hoping to gain by speaking with you, too—this will help guide the bullet points of your meeting and stay focused on the issues that matter to the prospect.
- **Rep agenda.** Explain what you'll be doing before, during, and after the meeting. Essentially, you're laying out what you'll be doing to prepare,
- **Buyer agenda.** Consider what the prospect will be doing before, during, and after the meeting.
- **Time.** Be sure you tell prospects how long the meeting should take before they accept the invitation. If you anticipate it taking 45 minutes, communicate that with the prospect and confirm that they agree 45 minutes is sufficient.
- **Outcome.** Define your goals for this interaction. What topics will you cover? What will you do with the information gathered during the meeting? What happens next?

3. Uncover pain points

Step three takes us into the "qualification" stage. Here, the goal is to uncover pain points by asking the right questions. It's important to note that uncovering pain points is about more than identifying the "what."

The [Sandler Pain Funnel](#) was designed to help reps navigate this process by providing a visual guide to asking probing questions—without being invasive or jumping ahead.

Instead, discovery follows a three-tiered process. First identifying the pain, then probing deeper to define what's causing the problem, and later—measuring and quantifying its impact.



[Source](#)

Questions to ask:

- *Can you tell me more about X?*
- *Give me an example of Y...*
- *Can you be more specific?*
- *How do you feel about Z?*
- *How long have you been dealing with X problem?*
- *Have you given up on solving the problem?*
- *What solutions have you tried so far?*
- *How did those solutions work?*
- *What was missing from prior solutions?*
- *How much do you think this problem has cost you?*
- *Has anything you've tried so far worked?*
- *How does X problem impact your day-to-day work?*
- *What do you think will happen if X problem persists?*

Keep in mind, “step three” will likely take place over a series of calls, emails, and social exchanges.

4. Discuss budget

This next step is all about getting the big, hairy money issues on the table. You’re trying to get the prospect to nail down a definitive budget early in the sales process. This gives them the opportunity to move forward or part ways—with no hard feelings or harassment from reps.

When sellers know how much money a prospect is willing to spend, it’s easier to put together a personalized solution that delivers the most bang for that budget.

Questions to ask:

- *At this stage, buyers often tell us there’s no budget for this solution. Am I right to assume that’s the case, here?*
- *Does your department have room to invest in a more comprehensive solution?*
- *What are you spending on your current solution?*
- *How much do you expect to spend in order to resolve X problem?*
- *Where will the money for this investment come from?*
- *Who controls the budget—and should they be involved in this conversation?*

5. Decision

Once you’ve covered objectives, budget, and pain points, you’ll want to look through the information you’ve gathered during steps 1-4 to determine whether your offer actually makes sense for your prospect.

Honesty is important here. If you see that the product/service isn’t a fit, you need to let the deal go and move on. If it does, your goal is ensuring that the solution they’ve put together checks all the right boxes.

Questions to ask:

- *What’s your timeline for making a purchase?*
- *What other solutions are you looking at?*
- *Who else needs to be involved in this decision?*
- *What does your boss think about this?*

- *How can I make sure that everyone who needs to be involved gets the information they need?*

6. Solution

The solution step is all about closing the sale. Here, your priority is making sure all decision-makers are happy with the proposed solution before making it official.

Questions to ask:

- *Has your team tried the demo yet?*
- *What else can I do to help you finalize your decision?*
- *When can we get started?*
- *What would it look like if our solution helped you overcome your challenges?*
- *If we make a deal, what would it mean for you personally?*
- *Looking at everything we've discussed, is there anything we haven't covered?*
- *If so, what haven't we addressed?*

7. Post-sell

The final step is the "post-sell," which is all about ensuring buyer satisfaction and providing support after the deal is "done."

Here, your goal is making sure the buyer is happy with their decision—and that they stay happy long-term. This stage includes everything from following up for an onboarding session to upgrades, cross-sells, and renewals.

Questions to ask:

- *What made you reach out to us?*
- *How can we help you get started with [Product/service]?*
- *Now that you're a customer, what can we do to make sure your experience is perfect?*
- *What questions do you have about the onboarding process?*

Final thoughts

The Sandler Sales System is a great foundational methodology (like [MEDDIC](#), [MEDDPICC](#) or [SPICED](#)) that integrates easily with just about any B2B sales strategy. Its power lies in the

fact that it's all about relationships, trust, and selling to people who *truly* stand to benefit from the products/services you're selling.

But—you'll need to adapt the methodology around real customer expectations, the needs of your sales team, and the big-picture objectives that define your business strategy.

Sandler Sales Questions Worksheet

Fill out this worksheet to formulate your own Sandler sales questions.

Step	Goal	Questions to Ask
Rapport	Learning more about your prospect, their needs, and the challenges they're up against. You're building trust, but also gathering information you can use to come up with the ideal solution.	
Upfront contracts	Establishing mutual trust, ground rules, and expectations so both parties feel comfortable conducting business.	
Pain points	Uncovering pain points by asking the right questions. You're trying to understand the problem, what's causing it, and its impact.	

Budget	Defining whether the prospect is willing and able to invest in your solution and setting a dollar amount for how much they can spend.	
Decision	Here, the goal is two-fold. It's about understanding the decision-making process, who's involved, and solution requirements. It's also about assessing whether the prospect is truly a good fit before moving to the next step.	
Solution	Wrapping up any "loose ends" before going in for the close.	
Post-sell	Keeping customers happy long after the deal is done by continuing to offer valuable solutions and proactive support.	

Chapter 4: SPIN Selling

SPIN Selling was introduced by Neil Rackham in [his 1988 book](#) of the same name.

In it, Rackham lays out a methodology for helping sellers anticipate and respond to complex sales situations by asking the right questions at the right time.

It's since become a classic – considered by many to be the “go-to” guide to problem-solving for sellers.

And while SPIN Selling is more than 30 years old, its emphasis on good questions and active listening make its lessons feel more urgent now than ever.

In a [2021 interview with sales expert Aaron Evans](#), Rackham explains that B2B reps must embrace a more consultative approach in order to stand out in today's overcrowded digital landscape.

In this article, we'll explain what SPIN Selling is, how it works, and what kinds of questions you should ask at each stage in the sales process.

What is SPIN Selling?

SPIN Selling is a sales methodology that centers on asking questions that reveal the buyers' needs, pain points, and challenges at the right time to deliver the greatest impact.

SPIN Selling is a sales methodology where sellers apply four types of questions – situation, problem, implication, and need-payoff – at different stages in the sales cycle.

Done right, the methodology makes it easier for reps to overcome objections, barriers, and information overload – and in turn, experience greater success.

According to Rackham, sellers need to leave traditional sales tactics behind and instead, act as “trusted advisors” to build trust, nurture relationships, and present solutions that win complex deals.

How does SPIN Selling Work?

SPIN Selling consists of just two key components: four types of questions and four stages of selling.

Each question type corresponds to a specific stage in the buying process, giving sellers a framework for making sure they ask the right questions at the right time.

For example, during your initial discovery call, you might focus on questions that help you understand the buyer's current situation. The next time you meet, you'll switch gears, focusing on "problem questions" that reveal more about prospect pain.

To give you a better sense of what this all means, here's a look at the question types and stages that define the SPIN sales framework:

SPIN questions

The SPIN acronym comes from the four types of questions at the center of the methodology, which break down as follows:

- **Situation.** Situation questions help sellers understand the basic facts about the buyer's current state. Essentially, you're trying to gather the foundational information that sets the tone for the rest of the sales process.
- **Problem.** Problem questions are used to uncover more details about the problems your prospects are facing. Your goal is uncovering the what and the why behind their pain points and challenges, probing deeper so you can learn what's really going on behind the scenes.
- **Implication.** Implication questions are used to help reps understand the consequences or impact of the prospect's problem. These questions give prospects a chance to voice their frustrations—and for reps, present an opportunity to strengthen bonds by validating prospect pain.
- **Need-payoff.** Need-payoff questions focus on understanding of the urgency and impact of solving the problem. Here, you're trying to figure out if solving this problem is a priority—and if so, quantifying the impact of that solution.

Once you've asked, answered, and addressed all these questions, it's time to move in for the close.

SPIN selling stages

According to Rackham, sellers tend to work through the same general steps as they move from discovery to close.

Here's a look at how those stages are defined within the SPIN methodology:

Opening. The opening stage is all about building rapport and establishing trust. You're trying to make a good first impression – while at the same time, gathering the details you need to flesh out a picture of your prospect's current situation.

Investigating. Once you have a clear sense of your prospect's situation, you'll want to transition into "investigation mode." Here, your job is to dig deeper, asking probing questions that help you understand the opportunities, challenges, and the "why" behind the prospect's problems. But – it's important to avoid making assumptions or pushing a solution too soon. Instead, you'll want to guide the prospect toward the information that enables them to identify and diagnose their own problems.

Demonstrating capability. The "demonstrating capability" stage is where you introduce the product or service you're offering. According to Rackham, there are a few ways you might approach this. You can focus on features, advantages, or benefits.

Features describe the product's capabilities. For example, if you're selling a laptop, features include things like RAM or connection ports. Essentially, things you might find on a spec sheet. Advantages explain why someone might choose your solution over some other option. So, if we're using the same example, a laptop's advantage over pen and paper is that you can write faster and edit your work without starting from scratch.

Finally, benefits represent the impact a product's features and advantages deliver to the user. With the laptop example, you might highlight the positive outcomes that purchase might have on the buyer's productivity or quality of work.

Obtaining commitment. The fourth and final stage is obtaining commitment. At this point, your goal is convincing the buyer to take the next step – that might mean convincing them to loop in other decision-makers, book a demo, or go ahead and sign the contract. This stage might span multiple meetings and phases – and in many cases, it's where reps encounter the most objectives.

SPIN Selling Questions

Now that we've gone over the SPIN question types and their corresponding stages, here's a look at how SPIN's questions and stages work together to guide the sales process:

1. Situation (Opening Stage)

- *Tell me about your company*
- *What do you sell?*
- *Who is your target audience?*
- *What is your role there?*
- *What does your average day look like?*
- *Can you tell me about your current processes?*
- *What tools/solutions are you currently using to handle X problem or Y use case?*
- *What made you choose those solutions in the first place?*
- *Are they effective?*
- *Who manages X use case/process?*
- *What resources are allocated to this problem/use case?*
- *Who owns the budget?*
- *Who is in charge of the strategy for X use case?*
- *What are your priorities this quarter/year?*
- *Why do those priorities matter to your business/customers?*

2. Problem (Investigating Stage)

- *How important is solving X problem to your business?*
- *Does your current approach ever fail?*
- *Do you think that problem can be solved?*
- *What will it take to get closer to solving that problem/pain point?*
- *If it were up to you, what would your approach to solving the problem look like?*
- *How important is it to you personally? What about your team?*
- *What are your biggest day-to-day challenges?*
- *What barriers do you anticipate in making a decision? Implementing a solution?
Getting users to embrace the change?*
- *What happens if you don't solve this problem?*

3. Implication (Demonstrating Capability Stage)

- *How does X problem impact your work?*
- *Would solving it help your career?*
- *How does it impact your team's work?*
- *How does it impact your customers/stakeholders?*

- *Has your current solution ever caused your business to miss critical milestones/targets?*
- *Why? What happened?*
- *How much are you spending on your current solution?*
- *How many hours do you/your team spend using that solution?*
- *If this problem didn't exist, how would you use your budget/time differently?*
- *What goals are you unable to achieve because of this problem?*
- *How much more could your team achieve each week by solving X problem?*
- *If you had more resources to solve this problem, how would you spend them?*

4. Need Payoff (Obtaining Commitment Stage)

- *What would solving this problem mean for your business?*
- *How would finding a solution help you succeed in your role?*
- *How would it help your peers, partners, and subordinates?*
- *How would solving the problem enable you to do A, B, or C?*
- *Would X solution increase stakeholder buy-in?*
- *Would Y tool help your team do A, B, and C?*

Tips for Successful SPIN Selling

Here are a few things to keep in mind while working SPIN into your sales rotation:

- You're not reading a script, you're having a conversation. Remember, SPIN defines the types of questions you ask, not the content of the questions themselves. The SPIN framework aims to give you a clear picture of what kinds of questions to ask in order to get the information you need to move the deal forward. It's smart to prepare a list of questions ahead of each meeting, but make sure you give the prospect room to take the conversation in a different direction.
- Don't go crazy with the questions. Building on our last point, asking questions is important, but listening will get you even further. Jamming as many questions as possible into each call is a missed opportunity to get to know buyers and uncover the root cause and the impact of their pain. You're better off preparing fewer questions for each call – that way prospects have more time to talk about their experience – and you have more opportunities to ask the probing questions that surface the kinds of insights that win deals.
- Keep questions open-ended. Open-ended questions give prospects a chance to serve up in-depth information and unexpected insights that reveal more about their situation than any yes or no question.
- Consider SPIN in context. While SPIN might define these stages with the terms we just outlined, there's a ton of overlap with some of the other methodologies we

covered. Often, pulling bits and pieces from several sales methodologies is a better bet. Sellers have more tools in their arsenal – and you can build a strategy that aligns with buyer and seller needs. Check out the [Sandler Selling System](#), the [MEDDIC](#) and [MEDDPIC](#) frameworks, the [SPICED](#) methodology, etc. Consider how they might complement or enhance the SPIN framework – as well as your existing tactics.

Final thoughts

After 30+ years in the game, SPIN Selling remains a powerful framework for navigating complex B2B deals.

The methodology helps sellers focus on what information is most important at the moment – allowing them to build trust and nurture relationships without overwhelming the buyer.

At the same time, SPIN isn't a standalone methodology. It is, however, an excellent foundation for a collaborative, consultative strategy that puts buyers first.

SPIN Selling Questions Worksheet

Fill out this worksheet to formulate your own SPIN selling questions.

Step	Goal	Questions to Ask
Situation	The opening stage is all about building rapport and establishing trust. You're trying to make a good first impression – while at the same time, gathering the details you need to flesh out a picture of your prospect's current situation.	
Problem	Here, your job is to dig deeper, asking probing questions that help you understand the opportunities, challenges, and the "why" behind the prospect's problems. But – it's important to avoid making assumptions or pushing a solution too soon. Instead, you'll want to guide the prospect toward the information that enables them to identify and diagnose their own problems.	
Implication	This is where you introduce the product or service you're offering. You'll want to make clear how your product/service helps buyers achieve the desired outcome.	
Need-payoff	At this point, your goal is convincing the buyer to take the next step – that might mean convincing them to loop in other decision-makers, book a demo, or go ahead and sign the contract. This stage might span multiple meetings and phases – and in many cases, it's where reps encounter the most objectives.	
Situation	The opening stage is all about building rapport and establishing trust. You're trying to make a good first impression – while at the same time, gathering the details you need to flesh out a picture of your prospect's current situation.	
Problem	Here, your job is to dig deeper, asking probing questions that help you understand the opportunities, challenges, and the "why" behind the prospect's problems. But – it's important to avoid making assumptions or pushing a solution too soon. Instead, you'll want to guide the prospect toward the information that enables them to identify and diagnose their own problems.	

Chapter 5: SNAP Selling

While SNAP's acronym is a bit of a stretch, it's a solid methodology. It's designed to help overwhelmed buyers navigate a complex B2B landscape with too many options, distractions, and conflicting ideas.

Instead, it's on sellers to serve up the right information—at the right time—so buyers can make an informed decision they feel good about.

In this article, we'll break down the four basics of SNAP, the three critical decisions, and from there, share some tips for making the methodology work for your sales team.

So, What, Exactly, is SNAP Selling?

SNAP selling is a methodology developed by sales guru, Jill Konrath and the basis of her [best-selling book](#), *'SNAP Selling: Speed Up Sales and Win More Business With Today's Frazzled Customers'*.

Essentially, it's a strategy that helps sellers win deals in today's modern sales landscape.

Per Konrath, SNAP is an antidote to the "[too much information problem](#)," where buyers have too many resources and too little time to interpret or make sense of it all.

SNAP breaks into two main parts, the four basics and the three decisions. Here's a bit more about each of those core components:

The four basics of SNAP

The four basics of SNAP are the source of its clunky acronym, with each "letter" representing a core principle that guides the sales process.



[Source](#)

The four basics of SNAP are the source of its clunky acronym, and break down as follows:

1. Keep It Simple

Make things clear & transparent for buyers. A key theme throughout Konrath's book is that you're dealing with "frazzled customers" who are juggling too many priorities. Konrath says that showing buyers everything that your solution can do can overwhelm them – even if they truly stand to benefit from what you're selling.

Instead of trying to do too much at once, you'll want to feed buyers the right answers at the right time – and avoid giving more than they asked for.

Key considerations:

- *Aim for fewer higher-quality, hyper-personalized meetings*
- *Propose fewer options to simplify the decision-making process*
- *Keep presentations/content short and to-the-point*
- *Set an agenda for each meeting*

- *End meetings by going over next steps—ie: confirming the next appointment, explaining when/why you'll follow-up*
- *Map out each touchpoint in the sales process*

2. Be iNvaluable

Stand out by positioning yourself as a go-to expert. In SNAP Selling, the salesperson must embody the role of “trusted partner.” So here, the goal is connecting the value of your solution to the problem the buyer wants to solve but doesn’t have the time or mental bandwidth to tackle on their own.

Key considerations:

- *Think about what can you do to add value to every buyer interaction*
- *Avoid debating with buyers or using overt persuasion tactics*
- *Instead, engage buyers on “equal footing” – you’re aiming for an intelligent conversation between peers*
- *Present data-driven, well-researched insights/solutions – you want to come across as confident and prepared*

3. Always Align

Align your business goals with buyers’ needs, priorities, and beliefs. You’ll need to develop a clear understanding of what matters to buyers and keep their goals front and center throughout the sales cycle. Ultimately, it’s not worth bringing up goals they’re not focused on right now – even if you think they need to shift their priorities.

Key considerations:

- *Align with your audience*
- *Understand their needs/concerns*
- *Identify organization-wide goals and the goals of individual decision-makers*
- *Align your solution with goals/pain points/concerns*

4. Raise Priorities

Keep important decisions top of mind. Frazzled customers are typically juggling multiple priorities at any given moment. As such, you’ll want to make sure you align your products/services/messaging around the priorities that matter most.

Key considerations:

- *Create a quantified gap between the status quo and the ideal future state*
- *Leverage trigger events (acquisitions, IPOs, a global pandemic, etc.) to shift prospect priorities*
- *Focus on presenting a vision of a better future*
- *Emphasize business drivers and metrics in your presentations*

The three decisions

The three decisions represent this understanding that there are three unique stages—or decisions—that need to happen before a buyer decides whether to buy—or not.

Konrath asserts that buyers actually work through the following three decisions before making the final call:

1. **Allowing access.** The first decision the buyer makes is whether or not they should let you in—or hear what you have to say.
2. **Moving away from the status quo.** Whether they realize it or not, people tend to lean into the status quo. At a certain point, the prospect needs to decide if they're willing to change – whether that means switching vendors, embracing something new, or updating a legacy solution. If you're going to close the deal, you'll need to convince prospects that making a change is worth the effort and expense.
3. **Changing resources.** The last decision the prospect makes before committing to a vendor is making sure they choose the right solution. At this stage, your goal is convincing the buyer that your solution is the best solution. With that in mind, you'll need to provide tangible evidence that you're prepared to solve their problems and help them achieve the desired outcome.

SNAP Selling: Key Terms

Konrath introduces several terms in her SNAP Selling book.

While this isn't a comprehensive glossary, the following terms come up on repeat and play a central role in helping sellers understand the methodology:

Frazzled Customer Syndrome

Frazzled customer syndrome is a “condition” among modern buyers where they're impatient, distracted, demanding, and super busy.

SNAP Factors

SNAP Factors are a series of four questions that “frazzled” buyers will be asking themselves about your solution.

1. Is the solution simple—and will it require significant time/effort/resources to implement?
2. Does this company/solution/sales rep provide value?
3. Does the solution align our goals/challenges/pain points?
4. Is solving this problem a priority or can it wait?

Buyer’s Matrix

Konrath defines the Buyer’s Matrix as the “core foundation” for your sales strategy. It’s designed to help sellers get inside the heads of decision-makers so they can better address their needs and achieve their goals. Like the [Sandler Selling System](#), the goal is to match buyers with the ideal solution. It’s important to note, however, that Sandler breaks the sales process into a sequence of seven steps, while SNAP goes broader – you’re kind of on your own when it comes to figuring out timing or what kinds of questions to ask.

Go Zone

The Go Zone refers to the space where SNAP Factors have been addressed and the buyer has responded to your outreach efforts.

D-Zone

The D-Zone represents the space where sales outreach/communications are ignored or deleted.

Tips for successful SNAP selling

Here are a few ways you can successfully apply SNAP selling within your existing sales strategy:

Tap into the “frazzled customer” mentality

If you haven’t figured it out yet, the “frazzled customer” is the focus of the SNAP methodology.

As such the first thing you’ll want to do is make sure you understand what buyers are experiencing. Now, again, B2B decision-makers are busy people. They’re always looking for

ways to do more in less time – which contributes to both productivity gains and total burnout.

According to Konrath, frazzled customers share the following characteristics:

- **Anxious.** Buyers want to immediately understand whether your solution is worth their time. That means, upfront, you'll want to be clear about who you serve, what you do, and how you can help. Don't make people book a call or even download a bunch of whitepapers to figure out if your solution is a fit.
- **Wary of complexity.** People tend to avoid anything they perceive to be overly complex, time-consuming, or risky. Sellers can combat this by helping buyers understand the implementation process, what they stand to gain, and the risks/missed opportunities of not taking action.
- **Distracted.** Prospects are being pulled in a million directions. They're dealing with demands from colleagues, clients, and their day-to-day work—and on top of that, fielding offers from competing sellers.
- **Demanding.** Finally, these buyers have high expectations. People don't want to waste their time dealing with sellers who can't offer unique, personalized solutions and expertise beyond what a basic Google search might turn up.

Bottom line: prospects want to work with smart reps that will serve up out-of-the-box ideas, relevant insights, and most importantly, Information about how to achieve critical business objectives.

With that in mind, your approach should focus on helping frazzled customers overcome these “barriers” by addressing them head-on in your messaging. For more on breaking down barriers, check out our guides to [Triangle Sales](#) and the [SPICED methodology](#)—both of which focus on closing deals by tapping into the customer's mindset.

Dig into Your Buyer Personas

While frazzled customers might share some common traits, they're not experiencing the same problems or challenges.

You'll want to analyze your most “common” customer types, then create a profile of each decision-maker within those accounts—which essentially acts as a template you can use to guide each conversation.

That way, you can come up with relevant discovery questions for each decision-maker/customer type and develop content, educational materials, and solutions to common problems.

Now, it's also important to understand that every customer is unique.

The persona templates are more of a shortcut to personalization—aimed at helping you serve up answers/solutions on the fly – and move deals through the pipeline faster.

Use the Buyer's Matrix

According to [Benchmark International](#), 87% of high-growth companies use a value-based sales approach—which focuses on showing buyers the direct benefits of using their product or service.

[Accenture research](#) found that roughly 75% of consumers find very-detailed (or “living”) customer profiles appealing—if brands can use them to create valuable experiences.

And—[per SmarterHQ](#), 72% of customers say they only engage with messaging that speaks to their individual interests. But that report also revealed that 86% are concerned about how brands use their data.

The Buyer's Matrix is a low-tech, but effective tool for personalizing the sales process—without crossing a line.

As mentioned, the Buyer's Matrix is a tool that helps you better understand the customer. That, in turn, makes it easier to personalize your message based on what the individual considers “valuable.”

The matrix essentially looks like a worksheet or a self-evaluation (here's [the Buyer's Matrix](#) featured in Jill Konrath's book as an example).



The Buyer's Matrix

Position:

1. Roles /Responsibilities

What is he/she in charge of or expected to manage?

2. Business Objectives & Metrics

What does he/she want to achieve? How is success measured? How is she/he evaluated?

3. External Challenges

What external factors or industry trends might make it more difficult to reach his/her objectives?

Excerpted from SNAP Selling: Speed Up Sales & Win More Business with Today's Frazzled Customers
For more savvy sales advice or sales training, visit www.SNAPselling.com © Jill Konrath, 2011

[Source](#)

You can design a Buyer's Matrix that better aligns with your sales process and using Weflow's [Notes function](#). But, you'll want to include a section for each of the following variables:

- Position. Who is the buyer/decision-maker and how do they fit into the bigger picture?
- Role & responsibilities. What is this person's job? What do they manage?
- Business objectives & KPIs. What does the buyer hope to achieve
- External challenges. What external forces/industry trends might make it harder to achieve specific business goals?
- Strategies & initiatives. What strategies/initiatives need to be in place to help the buyer achieve their goals?
- Internal issues. What internal barriers might prevent buyer/organization from achieving their goals (think—data silos or a lack of executive sponsorship).
- Primary interfaces. Who does this person interact with? Think—superiors, peers, subordinates, clients, external partners, suppliers, etc.
- Status quo. What solution/process is the buyer currently using?
- Change drivers. What would it take for this person to make a change?
- Change inhibitors. Why might this person stick with the status quo—even if they know it's not working?

Ultimately, this worksheet allows sellers to really put themselves in the shoes of each decision-maker associated with each persona.

The more time you spend filling out the matrix, the easier it will be to understand the unique pressures they face on the job—and during the buying process.

As a result, sellers can align their strategies and messaging around critical business objectives—and individual needs and challenges.

Final thoughts

SNAP Selling is best used in situations where you need to connect with busy prospects on their level and make it easier for them to buy.

The methodology helps sellers understand their prospects and the sales landscape so that they can directly address needs and pain points – and ideally, exceed expectations.

It also requires reps to become experts in the nuances and trends shaping their target market – and human behavior. So, as you might imagine, it's not exactly something reps can pick up in a day.

SNAP Questions Worksheet

Fill out this worksheet to formulate your own SNAP questions.

Step	Goal	Questions to Ask
Keep it Simple	Make things clear & transparent for buyers. A key theme throughout Konrath's book is that you're dealing with "frazzled customers" who are juggling too many priorities. Konrath says that showing buyers everything that your solution can do can overwhelm them — even if they truly stand to benefit from what you're selling. Instead of trying to do too much at once, you'll want to feed buyers the right answers at the right time — and avoid giving more than they asked for.	
Be INvaluable	Stand out by positioning yourself as a go-to expert. In SNAP Selling, the salesperson must embody the role of "trusted partner." So here, the goal is connecting the value of your solution to the problem the buyer wants to solve but doesn't have the time or mental bandwidth to tackle on their own.	
Always Align	Align your business goals with buyers' needs, priorities, and beliefs. You'll need to develop a clear understanding of what matters most to your buyer and keep those goals front and center throughout the sales cycle. Ultimately, it's not worth bringing up goals they're not focused on right now — even if you think they need to shift their priorities.	
Raise Priorities	Keep important decisions top of mind. Frazzled customers are typically juggling multiple priorities at any given moment. As such, you'll want to make sure you align your products/services/messaging around the priorities that matter most.	
Keep it Simple	Make things clear & transparent for buyers. A key theme throughout Konrath's book is that you're dealing with "frazzled customers" who are juggling too many priorities. Konrath says that showing buyers everything that your solution can do can overwhelm them — even if they truly stand to benefit from what you're selling. Instead of trying to do too much at once, you'll want to feed buyers the right answers at the right time — and avoid giving more than they asked for.	
Be INvaluable	Stand out by positioning yourself as a go-to expert. In SNAP Selling, the salesperson must embody the role of "trusted partner." So here, the goal is connecting the value of your solution to the problem the buyer wants to solve but doesn't have the time or mental bandwidth to tackle on their own.	

Chapter 6: BANT/GPCT

Introduced and formalized by IBM in the 1950s, the BANT analysis and qualifying framework consist of four components that help determine how many leads have real chances of becoming paying customers.

- Budget: Does the lead have enough money to pay for your product or service?
- Authority: Are you speaking with the decision-maker or someone who is part of the decision-making process?
- Need: Does your product fulfill the prospect's needs, and can you give them a solution to a problem they are facing?
- Timeline: Are your prospect's goals urgent, and do you need to provide a solution right away?

These four pillars were essential in the 1960s for sales and professionals in IBM and other companies to achieve the required number of potential leads and sell their products.

However, in recent years, this way of qualifying a prospect is slowly dying out (and you'll see why).

Why is the BANT sales framework no longer relevant?

Although BANT was a robust qualification framework in the 1960s and 1970s, its transactional approach towards selling is no longer relevant nowadays. The main reasons for this are the following:

1. It doesn't seek to understand the prospects. Instead of identifying business needs and discovering opportunities, it focuses on reducing the number of potential leads that are unworthy or unable to buy your product/service because they don't have enough money or power.
2. It follows outdated company structures. Nowadays, the decision-maker isn't always centralized to one person. Often, a group is responsible for discussing the goals and making the purchasing decision.
3. It's exceptionally seller-focused. Most sales scripts include questions about how the prospect can be useful to the company and not the other way around. In a nutshell, BANT sounds like an interrogation to today's consumers.
4. It doesn't understand that budgets are fluid. Budgets are rarely a fixed amount. Also, many services and products come with a monthly or yearly investment, so questioning the prospect's budget is just not relevant. The priority here should be

how urgent the prospect's needs are and how motivated they are to solve their problems.

And this is where GPCT comes to play.

What is the GPCT framework?

GPCT (Goals, Plans, Challenges, Timeline) is a modified version of BANT that Hubspot developed. Its goal is to help sales staff ask more relevant questions that will help them have a deeper understanding of their prospect's plans and desires.

The full name is GPCTBA/C&I – adding in the components of Budget, Authority/ Negative Consequences & Positive Implications.

Let's take a better look at the elements of GPCTBA/C&I and why it's better at qualifying prospects than the BANT approach.

Identifying the short and long-term goals your prospects are looking to achieve is probably the most critical factor when qualifying leads.

- Do they need a solution for a specific project, or are they looking for something to help them in the long run?
- What are the company's goals for the next three years?
- How many new customers/revenue/sales leads do they need to reach their target?

Understanding the prospect's needs is the top priority in the GPCT process, and it's what really sets itself apart from BANT. These basic questions can also give you a hint about what budget will be needed since long-term projects require more money than short-term ones.

Plans

The current plans of your prospects are another factor to consider in terms of their budget and implementation.

- Are they already working on a solution, or do they need consulting for how to best achieve their goals?
- Is there a roadmap or plan put in place?
- What is being done differently to achieve the goals in comparison to previous years?

Most of the time, you will get uncertain answers, blurry timeline goals, different business challenges they have faced, etc. This should give you the perfect moment to suggest a better alternative – your product or service.

However, you must have determined that you can help your prospect achieve his or her goals and back it up with proven outcomes and data to really make the final close.

Challenges

It's essential to also understand what the prospect defines as their most significant challenges so far and their fears for the future. If you can offer an effective solution to the prospect's problem, it will be easier to sell your product or service. Here are some example questions:

- What are the obstacles the prospect is facing, preventing them from reaching their end goal?
- What were previous challenges they managed to overcome, and how?
- Are there any problems in the decision-making process or the current budget?

Timeline

The prospect's timeline is a significant factor, which is why it's included in GPCT and BANT. You will see that many prospects find it difficult to answer most of those questions, but they are still essential to the qualifying process.

- Does the prospect's company need to reach the goals by a tight deadline?
- Are they already working to achieve their goals in the specified timeframe?
- Can the prospect change the timeline or some of the goals should they prove to be unrealistic?
- Are there any other things that are currently a priority?
- Do they have the required budget to start working on the goals right now, or is it somewhere in the future?

Budget

This is still a very critical factor for your sales team to determine before negotiations start. Here is how you can include this delicate subject:

- Are the prospects aware of your pricing conditions and is it what they expected?
- What are their most desirable ROI and profit margin?

- If it's a subscription service, for how long does the prospect's company want to sign up?
- How much money are the prospects currently spending without your product or service?

It's very important to go through the pitch first and see if the product or service your offer can bring a unique solution to the problems the prospect faces. These conditions may change the lead's budget and convince them to allocate more money than they initially set aside for this specific project.

Authority

There might be more than one decision-maker, but it's still crucial to make sure you're speaking with the right person. They will be the ones aware of all the challenges the business faces and sign off on the purchase agreement.

- Have they received other offers and what were the reasons for not choosing that company?
- Who else is involved in the buying decision process and is everyone on board on what they want their business to achieve?
- Has the business tried solving the problem internally and what were the challenges that came with that decision?

Another option is to research this beforehand so that you don't have to bring it into the conversation, setting extra time for discussing goals and asking more relevant questions.

Negative Consequences & Positive Implications

A crucial part of this framework is to understand what the prospects find as the best and worst-case scenarios.

- What do they think will happen once they achieve the goals and what do they fear might happen if they don't?
- Does the prospect have expectations they think will be difficult to fulfill?
- What are their future plans after those goals are completed?
- Will achieving those goals bring any personal gain to the prospect such as a bonus or a promotion?

This will give your sales team another opportunity to discuss how they are there to help the prospect and their business.

Make closing deals easier with GPCT

The world of sales is way past the era of exploiting and trying to make a sale no matter what. Human connection and long-lasting relationships between companies and customers are at the forefront, which is why GPCT is a great way to create a successful tactic for you and your revenue team.

GPCT Questions Worksheet

Fill out this worksheet to formulate your own GPCT questions.

Step	Goal	Questions to Ask
Goals	Identify the short and long-term goals of your prospects	
Plans	Ask about their plans and strategies to implement	
Challenges	Discuss the most important challenges they have faced so far & expect to deal with in the future	
Timeline	Define the expected timeline of actions & discuss realistic timeframes	
Budget	Ask about budget expectations and possibilities	
Authority	Figure out if you're speaking with a person of power who can make the purchase decision	

Chapter 7: SPICED

News flash: Sales isn't just about closing deals.

Historically, software companies have relied on selling licenses to businesses, but the subscription model disrupted that. Now, success no longer depends on the number of deals closed but on customer renewals and expansion—which only happens if your solution is actually helping customers reach their goals.

That's why [Winning by Design](#), a sales strategy consulting and coaching firm, developed SPICED, a sales framework that helps B2B teams be more customer-centric.

What is SPICED?

SPICED is a 5-step sales framework and acronym that stands for Situation, Pain, Impact, Critical Event, and Decision.

SPICED, Defined

- S** **Situation**
Facts, circumstances, and background details about your prospect
- P** **Pain**
The challenges that brought the prospect your way
- I** **Impact**
How you impact your prospect's business
- CE** **Critical Event**
Deadline to achieve that impact
- D** **Decision**
The process, committee, and criteria involved in purchasing a solution

SPICED is centered on understanding and achieving the customer's desired impact and maintaining an ongoing relationship around that impact, making it different from other methodologies that are solely focused on closing the deal.

"SPICED is a framework that helps you better diagnose your prospects. Just like a doctor, your prescribed solution should help them achieve their desired outcomes—and that prescription requires you to solve the source of their pains, not just the symptoms." — [Winning by Design](#)

How to use SPICED: Step-by-step

Here we've defined each step in SPICED methodology, included an example, and provided sample questions sales reps can ask prospects to move on to the next step.

1. Situation

Who are we targeting and why?

The Situation is the background information about the prospect, including the tools, people, industry, landscape of the company, and any other facts to help determine whether the prospect is a good fit for your solution.

E.g. An IT leader responsible for building and maintaining the company's tech stack for 500+ employees and two global offices.

Questions to ask:

- *How many sales reps work in your Los Angeles office?*
- *What sales tools are you using right now?*

2. Pain

Why would your company help them?

Pain addresses the specific challenges the company is facing that motivate them to consider your product as a possible solution. This could be training needs, help to support a distributed team, passing a security audit, or reducing errors in a certain process.

There are two types of pain: quantitative and qualitative.

E.g. The company is spending too much money and time on disjointed solutions that aren't solving their business needs as efficiently as they could (quantitative pain). Executives are also concerned about the potential for a data breach since they're sharing their sensitive information with so many vendors (qualitative pain).

Questions to ask:

- *What are the biggest challenges your team is facing right now?*
- *How do you currently onboard and train your sales team?*

3. Impact

If they purchased your product, what would the impact be?

Impact is the result of solving Pain. It's the outcome the prospect is trying to achieve by purchasing your solution. Impact can be rational or emotional.

Rational impacts typically fall into one of the following categories: increasing revenue, decreasing cost, or improving the customer experience. While rational impact benefits the company as a whole, emotional impact typically benefits the prospect on an individual level.

E.g. By adopting your solution, the prospective company could cancel subscriptions for three other tools, get all employees on a single platform, and reduce budget by \$200k annually (rational impact). The prospect would also get internal recognition for this (emotional impact).

Questions to ask:

- *How do slow-ramping sales reps affect your ability to hit revenue targets?*
- *What impact does a lack of visibility have on your recruiting efforts?*
- *How important is remote team collaboration to you?*

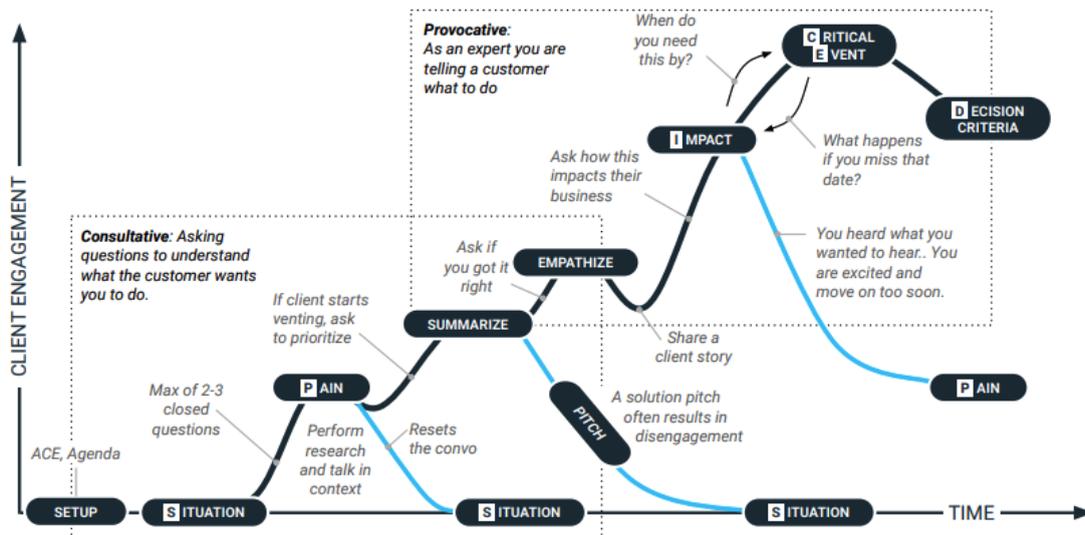


Figure 1: SPICED Framework in the context of a Discovery Call

4. Critical Event

What's driving the prospect's timeline for a purchase?

Uncovering Critical Events will reveal the deadline the prospect's working with to achieve their desired Impact or otherwise suffer negative consequences. If you hear a prospect mention a date or event that's important, you can determine if it's a Critical Event by asking, "What happens if you miss that date?"

E.g. This company makes 30% of its revenue in Q4. They also have a security audit coming up in Q1 of the next fiscal year. These are both Critical Events and reveal that the company will want to make a decision by the end of the current fiscal year.

Questions to ask:

- *Why is X date important to you?*
- *What happens if you don't have a solution by that date?*

5. Decision

How is a final purchase decision going to be made?

Decisions are usually made by a group of stakeholders rather than a single person. This is especially true for deals larger in size or scope. To close the deal, you'll need to know exactly who to involve, who will sign off, and all the approvals and steps involved along the way. You'll also need to understand the criteria the prospect will use to evaluate the right solution.

In other words, you need to find out three things in this step: the decision process, decision committee, and decision criteria.

E.g. The prospect needs a solution that can integrate with the company's existing apps, replace others, and comes with implementation and training support (decision criteria). The process involves getting sign-off by the CTO on all contracts above \$25k and the decision needs to go through the CEO and VP of Product. Legal will likely also require review of the contract before sign-off (decision process and committee).

Questions to ask:

- *Have you brought in a product like this before?*
- *How does your buying process work? Are there any other conversations we should start now, like with Legal, Security, and/or IT?*

Who can use SPICED?

Ideally, all revenue teams should be using the SPICED framework so everyone is speaking the same language.

Sales teams can use this framework at any point along the sales cycle: on discovery calls, for handoffs between teams, (e.g., prospecting to sales, sales to customer success), or for summarizing deals during internal forecasting meetings.

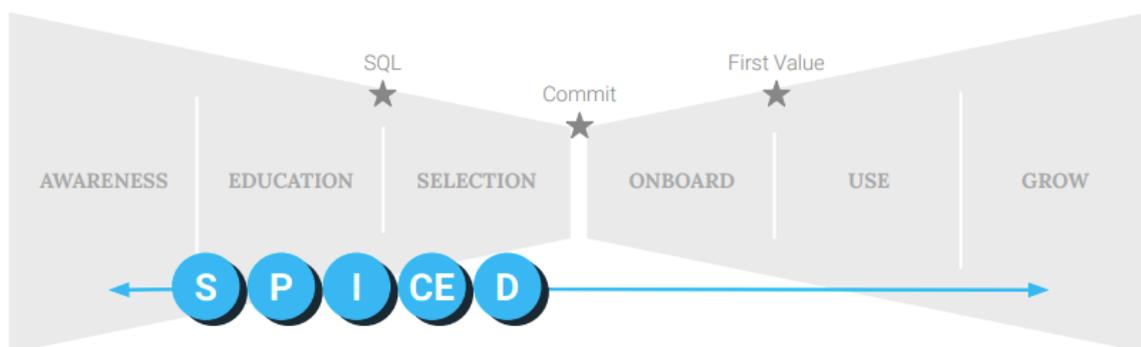


Figure 2: SPICED can be uncovered in the first qualification call, or over several discovery meetings.

Marketing should know and be aligned with all the stages of the SPICED framework, but be particularly knowledgeable about Situation, Pain, and Impact as these will be the most critical to hit—especially when focusing on campaign messaging and acquisition.

It's time to spice up your sales

By using the SPICED sales framework, you can find and organize prospects' information systematically to make sure you understand their background, pains, desired impacts, and how and when they'll commit to your solution. With this understanding, you'll be able to continue to nurture long customer relationships and drive long-term business success.

SPICED Questions Worksheet

Fill out this worksheet to formulate your own SPICED questions.

Step	Goal	Questions to Ask
Situation	Who are we targeting and why?	
Pain	Why would your company help them?	
Impact	If they purchased your product, what would the impact be?	
Critical Event	What's driving the prospect's timeline for a purchase?	
Decision	How is a final purchase decision going to be made?	
Situation	Who are we targeting and why?	

Closing thoughts

My primary goal for writing this book was to inform you about sales methodologies, how they work and how using them can help your team close more deals. But I also wanted to show that there are multiple different sales methodologies out there, which you can use to your advantage in your own way, according to what works best for your team and your business.

Of course, it's impossible to encompass all sales methodologies in one guide. Sales methodologies vary from situation to situation and consultant to consultant. Your team's mileage will almost assuredly vary if you try out the methodologies outlined in the book or devise your own "winning" sales methodology.

Each sales methodology will set you up for success in a different situation. The best way to figure out which one is right for you and your situation is to experiment with them, and even combine two or three of them into one way that works best for you.

Lastly, it's important to remember that discovery calls are two-way conversations. Ultimately, your reps need to listen to buyers and add value where it makes sense.

I wish you all the best.

Cheers,
Janis, co-founder of [Weflow](#) - update Salesforce fast.