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The Seller's Field Kit

Useful things for the weeks when the deal, the number, or both are giving you trouble.

Some weeks the deal goes quiet, the number looks worse than it did on Monday, and your manager wants an update you don't have yet. This is for those weeks.

It isn't a sales methodology. It's the handful of things I reached for when a quarter was going sideways, and a few I wish I'd reached for sooner. **Find the problem you have this week and start there.**

Having a bad week? Start here.

1. Is this actually a deal?

Most deals that fall out of the forecast were never really in it. They break in one of five places. Has the customer said, in their words, that they want to solve this? Does the money have a name: a budget line, a program, a fiscal year? Have you met someone who can make it happen, not just someone who likes you? Do you know how they'll actually buy it? And what makes it happen this period instead of next?

If you can answer all five with a name and a date, you have a deal. If you can't, you have a conversation worth having. Just don't forecast it yet.

Worksheet: Deal inspection

Deal ________________ Date ________ Online: quotabird.com/deal

QUESTION	YES / SORT OF / NO	WHO TOLD ME, AND WHEN
Customer: have they said they want to solve this?		
Money: does it have a name and a fiscal year?		
Power: have I met who can make it happen?		
Path: do I know how they'll buy it?		
Now: what makes it happen this period?		

2. You don't have enough pipeline

Everybody repeats 3X. It assumes you win about a third of what you qualify. The honest version is one divided by your own win rate: at 20% you need 5X, at 25% you need 4X.

If you don't know your win rate, count it. Of the qualified deals you had due last year, how much closed, by value? Then count only pipeline that's qualified and due this period against it. Everything else is next year's problem, however real it is.

Worksheet: My pipeline math

Period _________ Online: Pipeline Check, quotabird.com

My number		Closed so far	
Left to close		My win rate	
Coverage I need (1 ÷ win rate)		Qualified pipeline due this period	
Coverage I have		The gap	

3. Your biggest deal is carrying the quarter

Write your forecast without it. That's your real plan. If the plan doesn't work without it, you need a second way to the number now, not the week it slips.

Then look hard at the big one. Who set the close date, you or the customer? What happens in procurement, and who else has to sign? Two smaller deals you can actually move are often worth more than one big one you're hoping about.

4. You're single-threaded

If your champion disappeared tomorrow, who at the customer would notice the deal was gone? If the answer is nobody, the deal is one reorg away from over.

Ask your contact for one introduction this week, upward or sideways. Most people will say yes if you give them a reason that helps them look good, not just a reason that helps you close.

Worksheet: Account map

Account __________________ Online: quotabird.com/account

ROLE	NAME	MET?	WHAT THEY CARE ABOUT
Decides			
Pays			
Uses it			
Could block it			
Runs the buying process			
My champion			

5. The customer wants a discount

A discount is a trade, not a gift. What comes back? A signature date, more scope, a longer term, a reference you can use. And remember it comes out of your commission at the same rate it comes off the price.

Before you ask your manager to approve it, ask whether the problem is the price or the deal. A discount fixes price. It doesn't fix power, path or timing, and those are usually the real problem.

6. The deal has gone quiet

Busy and stalled look alike for about a week. Busy looks like short replies and moved meetings. Stalled looks like no replies and nobody else at the customer you can call.

Send one short note that's easy to answer: "Is this still a priority for this quarter, or should I check back in January?" A no is useful. Silence for two weeks after that's an answer too.

7. You're behind the number

Stop treating every deal the same. Sort them into three piles: can close this period on its own, can close this period with help, can't close this period. Put your time into the middle pile, and tell your manager exactly what help looks like.

Worksheet: Quarter rescue plan

Days left _________

DEAL	WHAT HAS TO HAPPEN	WHO DOES IT	BY WHEN

8. Don't make your manager guess

Good managers don't need every detail. They need to know what changed, what might go wrong, and where you need help. "Still feeling good" isn't an update. "Procurement moved the date two weeks, Sarah told me Thursday, and I need you to call her VP" is an update.

Before the forecast call, try to break your own deals the way your manager will. Which of the five from chapter 1 would you defend? And ask for help before the deal is on fire: what you need them to do, and by when.

Worksheet: Manager update

Deal ____________________ Date __________

What changed

Who told me, and when

What might go wrong

What I need from you, and by when