



**SOFTWARE
SALES
COACH**

Mastering Software Sales Calls:

A Comprehensive Guide to Excellence

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Start Here



I used this framework to help me become #1 at Salesforce, run and grow 5x Sales teams, become a CRO by the age of 33, and retire from the rat race to do what I love by the age of 35. Now I run Software Sales Coach. SSC helps Tech Sales Professionals get what we all want...FREEDOM.

This document is for you if you struggle with any of the following challenges:

<p>You always run out of time on your sales calls</p>	<p>You never feel like you cover enough ground on your calls</p>	<p>You get derailed by unimportant items by your prospects on calls</p>
<p>You never get clear feedback on how they feel before the calls end</p>	<p>You don't get follow ups scheduled so you end up chasing them around</p>	<p>You never get responses back after what you feel are great sales meetings</p>

I GET IT!

Sales is difficult enough as it is with budgets seeming tighter than ever. The last thing you need to be doing is making it harder on yourself by not controlling what's 100% in your control. How you run sales calls.

Sales calls are more than just conversations; they're the building blocks of successful software sales. In a world where buyers are more informed than ever, mastering your calls means the difference between missed opportunities and consistent wins.

Why Most Sales Reps Struggle

Many sales reps lose deals not because their product isn't the right fit, but because their approach lacks structure, clarity, or buyer focus. Here are some common pain points reps face:

- **Disorganized Calls:** Running out of time or skipping key points.
- **Poor Buyer Experience:** Calls feel like interrogations rather than collaborative discussions.
- **Lost Momentum:** Failing to drive clear next steps, leading to ghosted emails.

This guide addresses these issues head-on with actionable strategies you can implement immediately.

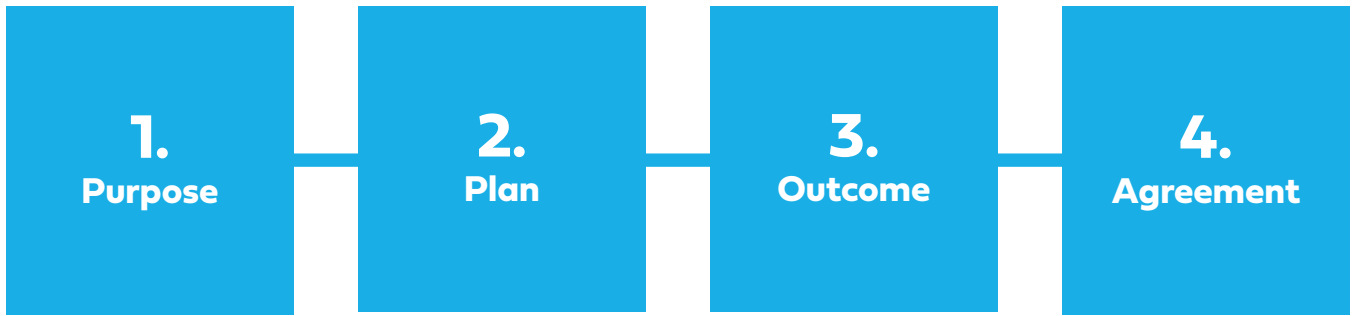
How This Guide Will Help You

By the end of this guide, you'll know:

1. **How to Structure Calls for Success:** From setting the tone to driving actionable next steps.
2. **What to Say and When:** Scripts and templates for every part of the call.
3. **How to Handle Objections Like a Pro:** Frameworks to confidently navigate challenges.
4. **The Tools to Take Control:** Strategies to stop chasing deals and start closing them.

Key Outcomes You'll Achieve

- **More Closed Deals:** Increase your win rate by improving buyer experience and execution.
- **Better Time Management:** Avoid wasted meetings with clear structure and purpose.
- **Stronger Buyer Relationships:** Build trust and rapport through thoughtful communication.



Part 1: Framing the Call

What Is Framing?

Framing is the intentional process of setting expectations at the beginning of a call. It ensures everyone is aligned on the purpose, the plan, and the desired outcome of the meeting. Without it, calls often drift, leading to wasted time and frustrated buyers.

Why It's the Foundation of a Successful Call

- 1. Establishes Professionalism:** Buyers will perceive you as prepared and trustworthy.
- 2. Prevents Wasted Time:** Keeps the conversation focused and productive.
- 3. Reduces Anxiety:** Buyers feel at ease when they know what to expect.



The Four-Step Framework

<h2>1. Purpose</h2> <p>Clearly define why you're meeting.</p>	<p>Script: “The purpose of today’s call is to explore whether we can address [specific challenge]. Does that align with your expectations?”</p>
<h2>2. Plan</h2> <p>Outline a specific agenda.</p>	<p>Script: “Here’s how I’d like to structure our time: First, we’ll review your goals. Then, I’ll share insights from similar clients. Finally, we’ll determine next steps.”</p>
<h2>3. Outcome</h2> <p>Define what success looks like.</p>	<p>Script: “By the end of this call, we should know if it makes sense to schedule a follow-up.”</p>
<h2>4. Agreement</h2> <p>Confirm alignment.</p>	<p>Script: “Does this agenda work for everyone? Is there anything you’d like to add?”</p>



Detailed Example

Scenario: Discovery Call

1. Purpose	2. Plan	3. Outcome	4. Agreement
"Today's call is about understanding your current challenges and whether our solution might be a fit."	"We'll start with your goals, discuss current processes, and explore how we might help."	"By the end, we'll decide if it makes sense to schedule a follow-up."	"Does that sound good? Anything you'd like to prioritize?"

Common Pitfalls and How to Avoid Them

1. Starting with Small Talk:

- **Why It's a Problem:** Wastes valuable time.
- **Solution:** Use a quick transition like, "I know your time is valuable, so let's dive in."

2. Being Too Vague:

- **Why It's a Problem:** Leads to confusion and derailments.
- **Solution:** Always specify what will be covered and why.

Checklist for Framing Calls

- Have I defined the purpose clearly?
- Is my agenda specific and relevant?
- Have I confirmed alignment with the buyer?
- Am I prepared to handle any immediate concerns?



Templates for Framing

Discovery Call Template

1. Purpose	"The purpose of today's call is to explore whether we're a fit to address your challenges."
2. Plan	"Here's the agenda: 1) Review your goals, 2) Discuss current challenges, 3) Outline next steps."
3. Outcome	"By the end, we should know if a deeper discussion makes sense."
4. Agreement	"Does that work for you? Anything to add?"

Demo Call Template

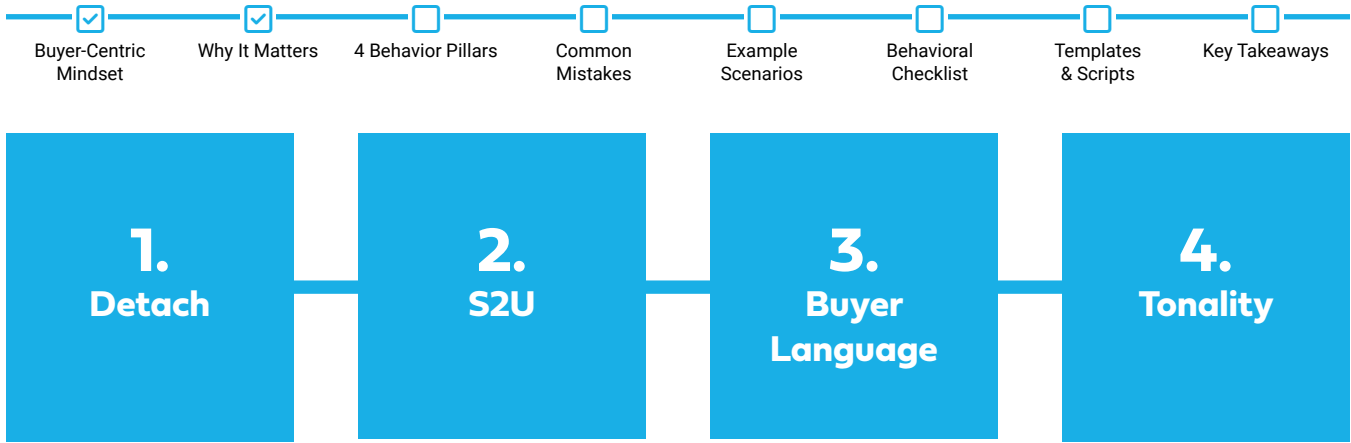
1. Purpose	"The purpose of today's call is to demonstrate how our solution can address [specific need]."
2. Plan	"We'll start with an overview, dive into key features, and leave time for Q&A."
3. Outcome	"Our goal is to decide on next steps for evaluation."
4. Agreement	"Does this agenda align with your expectations?"

Script for Addressing Landmines During Framing

Scenario	Response
The buyer asks for pricing upfront.	<p>“I completely understand that pricing is important. Because our solutions are tailored, it’s difficult to provide an accurate estimate without understanding your specific needs. Let’s explore whether our solution aligns with your challenges first, and then I can provide a detailed proposal.”</p>

Key Takeaways

Framing is the backbone of any successful sales call. It aligns expectations, sets the tone, and ensures productivity. Mastering this skill will significantly improve your buyer’s experience and your overall call success rate.



Part 2: Call Behavior

What Is Call Behavior?

Call behavior refers to the way you present yourself, communicate, and interact during a sales call. It includes your mindset, tone, language, and ability to adapt to the buyer's needs. While having a great product and solid sales strategy is crucial, **how you behave on the call** often determines the buyer's perception of you and your solution.

Why Call Behavior Matters

- 1. It Shapes Buyer Perception:** Buyers decide if they trust and like you within minutes of the call starting. Poor behavior can ruin even the most compelling pitch.
- 2. It Builds Buyer Confidence:** Buyers want to feel they're working with a professional who understands their needs and can help them solve their challenges.
- 3. It Creates a Positive Buying Experience:** A call that feels natural, collaborative, and engaging leaves the buyer feeling good about working with you.

Real-Life Example:

Imagine a sales rep who dominates the conversation, talks over the buyer, or rushes through answers. Even if their solution is a perfect fit, the buyer is less likely to proceed because the experience feels unprofessional or unpleasant.

1.
Detach
Yourself from
the Outcome

2.
Seek to
Understand
(S2U)

3.
Use
Buyer-Specific
Language

4.
Master Your
Tone and
Communication
Cadence

The Four Pillars of Effective Call Behavior

To ensure your behavior supports a successful sales call, focus on these four pillars:

1. Detach Yourself from the Outcome

The most successful sales reps approach calls with confidence, not desperation. Buyers can sense when you're overly eager or nervous, which creates discomfort.

- **Key Mindset:** Act as if you've already hit your quota.
- **Why It Works:** When you're detached, you focus on helping the buyer rather than closing the deal. This creates trust and rapport.

Script for Confidence:

Scenario: If the buyer seems hesitant about your solution.

"Whether or not we decide to move forward today, my priority is to ensure you leave this call with a clear understanding of how we might help. Does that sound good?"



Pro Tip: Remind yourself before every call: *"The worst thing that happens is they say no, and that's okay. My job is to focus on understanding and helping."*

2. Seek to Understand (S2U)

Buyers want to feel understood before they feel sold to. Approach the call as a collaborative exploration rather than a sales pitch.

- **Key Behavior:** Ask open-ended, thoughtful questions and actively listen.
- **Why It Works:** Buyers are more likely to engage when they feel heard and valued.

Example Questions:

- “Can you walk me through how this problem is impacting your team on a daily basis?”
- “What outcomes would you need to see to consider this project a success?”

Layering Questions:

When a buyer provides an answer, dig deeper using their own language:

- **Buyer:** “We need to improve productivity.”
- **You:** “When you say ‘improve productivity,’ what does that look like in measurable terms? Are we talking about reducing time spent on manual tasks, increasing output, or something else?”

Checklist for Seeking to Understand:

- Did I ask at least 3 open-ended questions before diving into solutions?
- Did I repeat or paraphrase key points to show I was listening?
- Did I avoid interrupting or rushing the buyer?



3. Use Buyer-Specific Language

Adapting your communication style and language to mirror the buyer's preferences builds trust and connection. This requires careful attention to what the buyer says and how they say it.

Tips for Mirroring Language:

- **Match their terminology:** If the buyer calls your product a “platform” rather than “solution,” use the term “platform” consistently.
- **Reflect their priorities:** If they emphasize ROI, frame your points around measurable returns.

Example:

- **Buyer:** “We’re concerned about scalability as we grow.”
- **You:** “I understand scalability is a key priority. Here’s how our platform scales with teams your size and beyond.”



Pro Tip: Use the buyer's job title and role to tailor your messaging. For example:

- **Talking to a CFO:** Highlight cost savings and ROI.
- **Talking to a VP of Sales:** Emphasize increased pipeline efficiency and revenue impact.

4. Master Your Tone and Communication Cadence

How you say something often matters more than what you say. A calm, confident, and professional tone creates a positive impression, while nervous or rushed speech can alienate buyers.

Tips for Effective Communication:

- **Match Their Pace:** If the buyer speaks slowly and thoughtfully, slow down your own cadence.
- **Pause for Impact:** After asking a question or making a key point, pause to give the buyer time to process.
- **Avoid Overloading:** Keep answers concise. Aim for 1-2 minutes per response to maintain engagement.

Example of Matching Tone:

- **Buyer (slow and deliberate):** “We’ve been evaluating options for a while, and we’re trying to make the best decision for our team.”
- **You (mirroring tone):** “That makes sense. It’s important to take the time to find the right fit. Let’s explore how we might address your team’s specific needs.”



Pro Tip: Record and review your calls to assess your tone and talk-to-listen ratio. Tools like Gong or Chorus can provide valuable insights.



Common Mistakes to Avoid

- 1. Talking Too Much:** Buyers should talk at least 60-70% of the time.
- 2. Ignoring Non-Verbal Cues:** Pay attention to pauses, hesitations, or tone shifts that might indicate confusion or concern.
- 3. Using Jargon:** Avoid technical language unless the buyer specifically uses it.

Role-Playing Scenarios

Scenario 1: Buyer is Distracted

Issue: The buyer seems disengaged or distracted.

Solution: Use a direct, polite question to re-engage them.

Script: “It seems like there’s a lot on your plate today—should we pause and reschedule, or would it be helpful to focus on just one or two priorities for now?”

Scenario 2: Buyer is Rushing the Call

Issue: The buyer wants to skip straight to pricing or technical details.

Solution: Acknowledge their urgency while redirecting to the agenda.

Script: “I hear you, and I want to respect your time. Before we dive into specifics, let’s make sure I fully understand your needs to provide the most relevant details.”

Behavioral Checklist

- Am I entering the call with a calm, confident mindset?
- Did I frame the conversation with buyer-specific language?
- Am I matching the buyer's tone and cadence?
- Did I pause after key questions to allow for thoughtful responses?
- Am I consistently seeking to understand before presenting solutions?

Templates for Behavior Scripts

Opening Statement	“Thank you for taking the time today. I know your schedule is busy, so my goal is to ensure this conversation is a productive use of your time. Let’s focus on [specific goal or challenge] and see how we might help.”
Redirecting a Conversation	“That’s an important question, and I’d love to dive into it. Just to make sure we’re aligned, let’s quickly confirm [original agenda point] so we can address your question in full context.”
Wrapping Up	“I appreciate the insights you’ve shared today—it’s been incredibly helpful. Before we wrap, let’s confirm next steps to ensure we keep moving forward smoothly.”

Key Takeaways

Mastering call behavior is about more than being polite—it’s about building trust, creating a positive experience, and demonstrating your expertise through thoughtful communication. By focusing on detachment, active listening, tailored language, and tone mastery, you’ll leave buyers feeling confident and engaged in the process.



Part 3: Execution Excellence

What Is Execution?

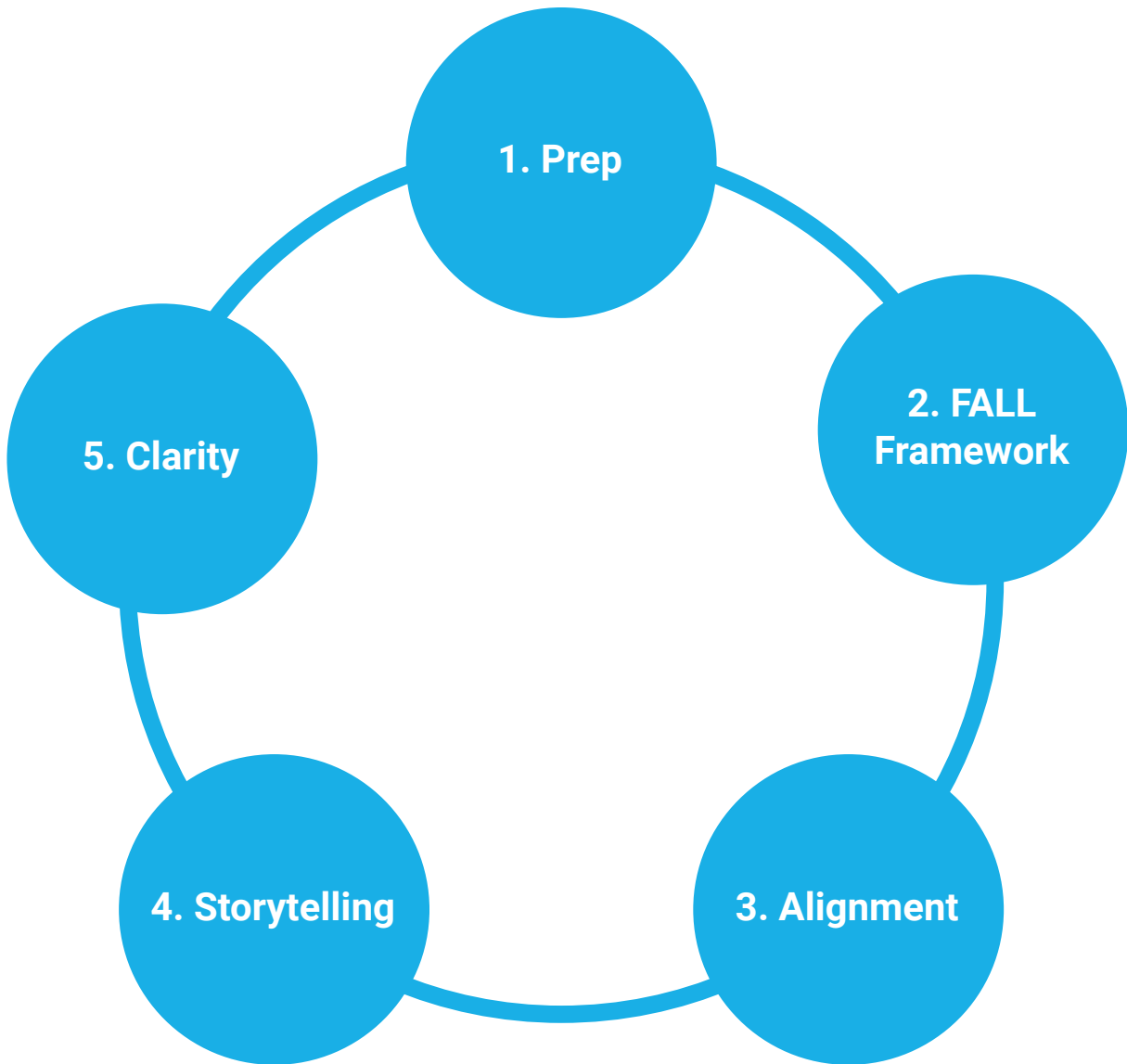
Execution refers to how you carry out the core elements of your sales call. It's about asking the right questions, listening actively, and steering the conversation toward a productive outcome. It involves the precise combination of preparation, frameworks, communication techniques, and alignment strategies to ensure every moment of the call drives value for both the buyer and you.

Why Execution Matters:

- 1. Discovery Defines Success:** A poorly executed discovery call can misdiagnose a buyer's needs, misalign expectations, and lead to deal stagnation or failure.
- 2. Win Confidence:** Buyers are evaluating your competence not only in your product but in how you lead the process.
- 3. Clarify Value:** Strong execution creates clarity around the buyer's problem, desired outcomes, and the path forward, making your solution the obvious choice.

Why Should You Care About Mastering Execution?

Execution is where most deals are won or lost. Many sales reps fail because they mistake discovery calls for information-gathering sessions rather than meaningful conversations. When done right, execution transforms these conversations into collaborative problem-solving exercises that build trust and align your solution with the buyer's needs.



The Five-Step Framework for Execution Excellence

The framework consists of **Prep**, **FALL Framework**, **Alignment**, **Storytelling (Disney)**, and **Clarity**. Each step is designed to ensure you maximize the value of your interactions with buyers.

Step 1: Preparation

Preparation sets the tone for the entire call. It allows you to anticipate potential challenges, tailor your approach, and demonstrate your credibility. The more prepared you are, the smoother the conversation will flow.

What to Research Before the Call:

<h3>1. The Buyer</h3>	<ul style="list-style-type: none"> • Their role, responsibilities, and pain points. • Any relevant LinkedIn activity or shared connections.
<h3>2. The Company</h3>	<ul style="list-style-type: none"> • Recent news, press releases, or funding announcements. • Key goals or challenges indicated on their website or in industry reports.
<h3>3. The Industry</h3>	<ul style="list-style-type: none"> • Trends impacting their sector. • Competitor activities or shifts in the market.

Checklist for Preparation

- Reviewed the CRM notes from prior interactions.
- Researched the buyer's company website and recent news.
- Identified 3-5 thoughtful questions specific to their situation.
- Developed a hypothesis about their primary challenges.
- Customized the call agenda based on research

Step 2: The FALL Framework

The **FALL Framework** ensures your call feels like a conversation rather than an interrogation. It stands for **Frame, Ask, Listen, Layer**.

1. Frame

Set the context for your question by tying it to your research or their previously stated priorities. Framing shows you've done your homework and guides the buyer toward meaningful answers.

Example:

Generic: "What are your goals for the year?"

Framed: "In light of the recent industry trend toward automation, many companies are focusing on reducing manual tasks. How does that align with your team's goals for the year?"

2. Ask

Ask open-ended questions that encourage detailed, thoughtful responses. Avoid yes/no questions unless you're confirming a point.

Examples of Great Discovery Questions:

"How are you currently addressing [specific challenge]?"

"What's working well in your current process, and where do you see gaps?"

"What would success look like for you six months from now?"



Pro Tip: Use "help me understand" as a softener for challenging or probing questions.

"Help me understand how this process impacts your team's productivity."

3. Listen

Actively listen to their responses and avoid jumping to conclusions. Take notes, reflect on what they've said, and clarify as needed.

Listening Tips:

Repeat or paraphrase their points to confirm understanding:

“So what I’m hearing is [summary]. Did I get that right?”

Pay attention to tone and emotion to uncover deeper insights.

4. Layer

Use follow-up questions to dig deeper and uncover additional details. This is where the most valuable information often lies.

Layering Example:

Buyer: “We’re struggling to hit our sales targets because our team isn’t using our CRM effectively.”

You: “When you say the team isn’t using the CRM effectively, is that because of a lack of training, the tool’s limitations, or something else?”

Checklist for FALL Execution:

- Did I frame my questions with relevant context?
- Did I ask open-ended, thoughtful questions?
- Did I listen actively and paraphrase for clarity?
- Did I use layering questions to dig deeper into key areas?



Step 3: Alignment

After uncovering their pain points, align your solution to their specific needs. This step ensures the buyer sees the direct relevance of your product to their challenges.

How to Align:

Summarize Pain Points:

“Based on what we’ve discussed, it sounds like your main priorities are [list priorities]. Did I get that right?”

Position Your Solution:

“Our platform is designed to address exactly these challenges. Here’s how we can help...”

Example Alignment Script:

“You mentioned that one of your biggest concerns is reducing the time your team spends on manual tasks. With our solution, you could automate those workflows, freeing up 30-40% of their time for higher-value activities. Does that align with what you’re hoping to achieve?”



Step 4: Storytelling (Disney)

Stories are one of the most powerful ways to communicate value and build trust. Use **customer success stories** to show the buyer how you've helped others in similar situations.

The Hero's Journey Framework:

1. Introduce the Hero (Customer)	"We worked with a company similar to yours in the [industry]."
2. Describe the Challenge	"They were facing [specific challenge]."
3. Explain the Solution	"We implemented [your solution], focusing on [key feature or strategy]."
4. Highlight the Outcome	"Within six months, they reduced [metric] by 25% and increased [metric] by 40%."

Example Disney Script:

"A sales team we worked with last year had a similar challenge—too much time spent on admin tasks and not enough on selling. By automating key workflows, they reduced manual data entry by 50% and saw a 20% uptick in sales productivity within three months."

Checklist for Storytelling:

- Is the story relevant to the buyer's industry or role?
- Does it highlight a similar challenge and measurable outcome?
- Does it position the buyer as the hero and you as the guide?

Step 5: Clarity

Clarity ensures both you and the buyer leave the call aligned on what was discussed, what value was uncovered, and what happens next.

How to Achieve Clarity:

1. Summarize Key Points	2. Confirm Understanding:	3. Outline Next Steps:
<p>“Just to recap, today we identified [key pain points] and discussed how [your solution] could address these.”</p>	<p>“Does that align with your understanding, or is there anything I missed?”</p>	<p>“The next step would be [specific action]. Does that sound good?”</p>

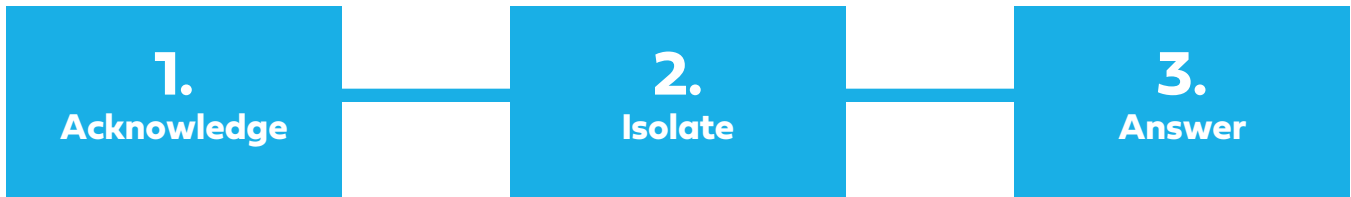
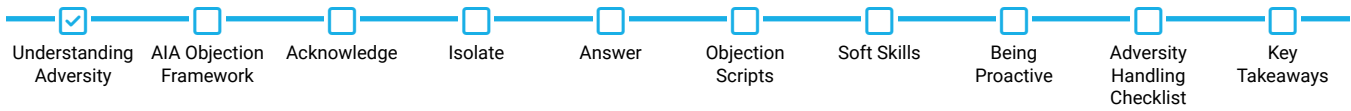
Checklist for Clarity:

- Did I summarize the key points and align on them with the buyer?
- Did I confirm the buyer’s understanding and address any concerns?
- Did I clearly outline and confirm the next steps?

Key Takeaways for Execution Excellence

- Execution is the foundation of a successful sales process.
- The FALL Framework transforms discovery from an interrogation to a conversation.
- Align your solution with the buyer’s specific needs to build trust and relevance.
- Use storytelling to demonstrate value and de-risk the buyer’s decision.
- Always end with clarity to ensure alignment and momentum.

By mastering these steps, you’ll not only improve the quality of your sales calls but also significantly increase your close rates.



Part 4: Navigating Adversity

What Does It Mean to Navigate Adversity?

In sales, adversity refers to the obstacles, objections, and unexpected challenges that arise during calls and throughout the sales process. Adversity might take the form of buyer objections, misaligned expectations, internal roadblocks on the buyer's end, or conflicting priorities among stakeholders.

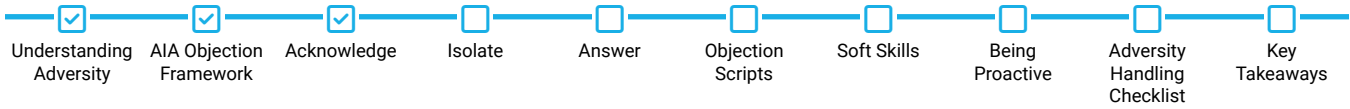
Key Challenges You'll Face:

- 1. Objections:** Questions or concerns from buyers that create hesitation about moving forward.
- 2. Unexpected Shifts:** Changes in buyer priorities or stakeholders.
- 3. Competitive Pressures:** Buyers evaluating your solution alongside competitors.
- 4. Stakeholder Conflicts:** Disagreements among decision-makers about what matters most.

Why You Need to Master Handling Adversity

Adversity is inevitable in software sales, especially in complex enterprise deals. Success depends on how skillfully you address these challenges. Navigating adversity well can:

- **Build Trust:** Buyers will see you as a credible partner who can guide them through uncertainty.
- **De-Risk the Deal:** Proactively addressing concerns helps buyers feel confident in their decision-making.
- **Differentiate You from Competitors:** Handling objections gracefully and with confidence leaves a lasting impression.



The Framework for Handling Adversity: AIA

Use the **AIA Framework** to systematically handle adversity in any sales scenario. AIA stands for **Acknowledge, Isolate, and Answer**.

Step 1: Acknowledge

When faced with an objection or challenge, the first step is to acknowledge it. Buyers need to feel heard before they'll trust your response.

Why Acknowledge?

Acknowledging an objection:

- **Disarms Resistance:** Buyers feel respected and understood.
- **Buys You Time:** Pausing to acknowledge gives you a moment to gather your thoughts.

Example Phrases to Acknowledge:

"I appreciate you bringing that up—it's an important point."

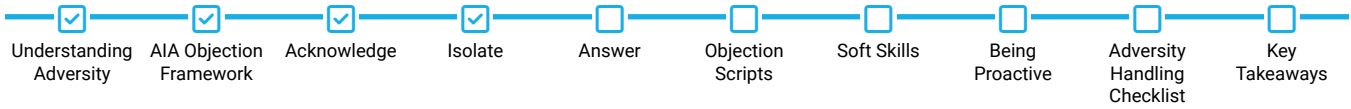
"That's a great question, and I can see why you'd feel that way."

"Thank you for sharing that concern—it's helpful to understand your perspective."

Example Script:

Buyer: "Your solution seems great, but I'm not sure it's worth the price compared to our current tool."

You: "I appreciate you sharing that concern. Budget is always a critical factor in decisions like these, so I'm glad you brought it up."



Step 2: Isolate

Once you've acknowledged the concern, isolate it to understand its full scope. Clarify whether it's the buyer's only concern or if other issues exist.

Why Isolate?

- **Prioritize Issues:** Understand whether this is the main obstacle or one of many.
- **Prevent Overreaction:** Avoid spending too much time addressing a minor concern.

Questions to Isolate Concerns:

"Aside from this, are there any other concerns that come to mind?"

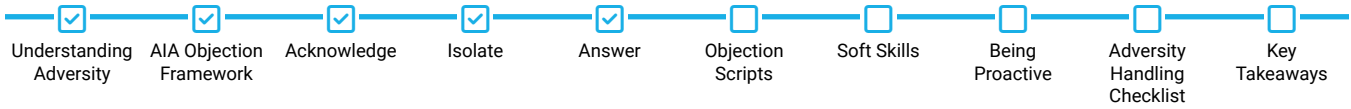
"If we were able to address this, would you feel confident moving forward?"

"How significant is this concern compared to other factors you're evaluating?"

Example Script:

Buyer: "Your solution seems great, Buyer: "I don't think our team has the bandwidth to adopt a new tool right now."

You: "That's a fair concern. Aside from bandwidth, are there any other challenges you foresee with this solution?"



Step 3: Answer

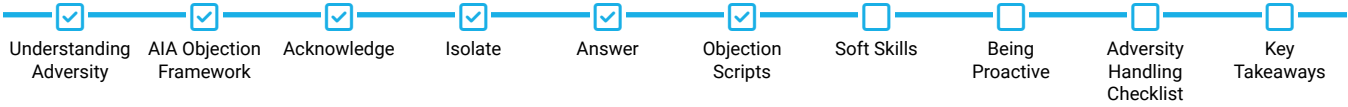
After isolating the concern, provide a tailored and thoughtful response. The goal is to reduce perceived risk and reassure the buyer.

How to Answer Effectively:

1. **Validate the Concern:** Reinforce that their concern is valid and not unusual.
2. **Provide Evidence:** Use data, case studies, or testimonials to support your response.
3. **Ask for Alignment:** Confirm whether your answer resolves their concern.

How to Answer Effectively:

1. Validate	“That’s a common question, and many of our clients felt the same way initially.”
2. Evidence	“For example, [Client Name] had similar concerns but found that [outcome or result].”
3. Align	“Does that address your concern, or is there something else you’d like me to elaborate on?”



Common Objections and How to Handle Them

1. “It’s Too Expensive”

Acknowledge: “I understand that budget is a top priority—it’s a critical factor for any investment.”

Isolate: “Is price the only concern, or are there other factors you’d like us to address?”

Answer: “Our solution is designed to deliver measurable ROI by [specific benefit]. For example, [Client Example] saw [quantified result] within [timeframe]. Would it help if I walked you through a detailed cost-benefit analysis?”

2. “We’re Already Using a Competitor”

Acknowledge: “That makes sense—many of our customers were using similar tools before switching to us.”

Isolate: “What do you like about your current solution, and where do you see room for improvement?”

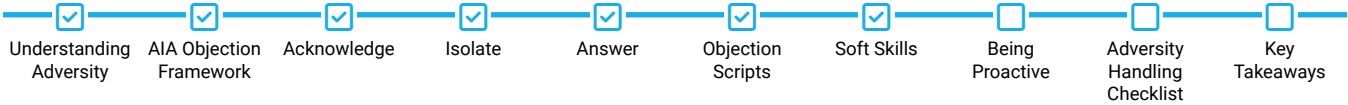
Answer: “We often hear that while [competitor’s tool] handles [specific task], it falls short on [specific limitation]. With our solution, [specific advantage]. Would you be open to exploring how we address those gaps?”

3. “We Don’t Have the Bandwidth Right Now”

Acknowledge: “I hear you—timing is everything when it comes to rolling out new solutions.”

Isolate: “Is bandwidth the main challenge, or are there other factors influencing your timeline?”

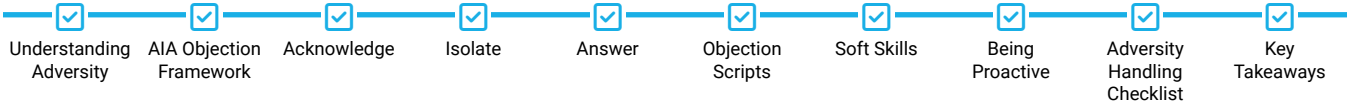
Answer: “We’ve worked with clients who had similar concerns. One strategy that worked well was [specific implementation approach]. Would it be helpful if I outlined a phased implementation plan that minimizes the impact on your team’s workload?”



Soft Skills for Navigating Adversity

The **how** you communicate is just as important as **what** you say. Buyers respond not only to your words but also to your tone, confidence, and empathy.

<h3>1. Pausing Before Responding</h3>	<p>Take a moment after hearing an objection to show you're considering their perspective.</p> <p>Example: "That's a great point—let me think about how best to address that."</p>
<h3>2. Confidence</h3>	<p>Your tone should convey certainty and competence, even if you're still gathering information.</p> <p>Example: "Let me check with my team on that and get back to you tomorrow. I want to ensure you have the most accurate information."</p>
<h3>3. Empathy</h3>	<p>Demonstrate that you genuinely care about resolving their concerns.</p> <p>Example: "I completely understand why this would be a concern. Let's work together to find a solution that addresses it."</p>



Proactive Strategies to Prevent Adversity

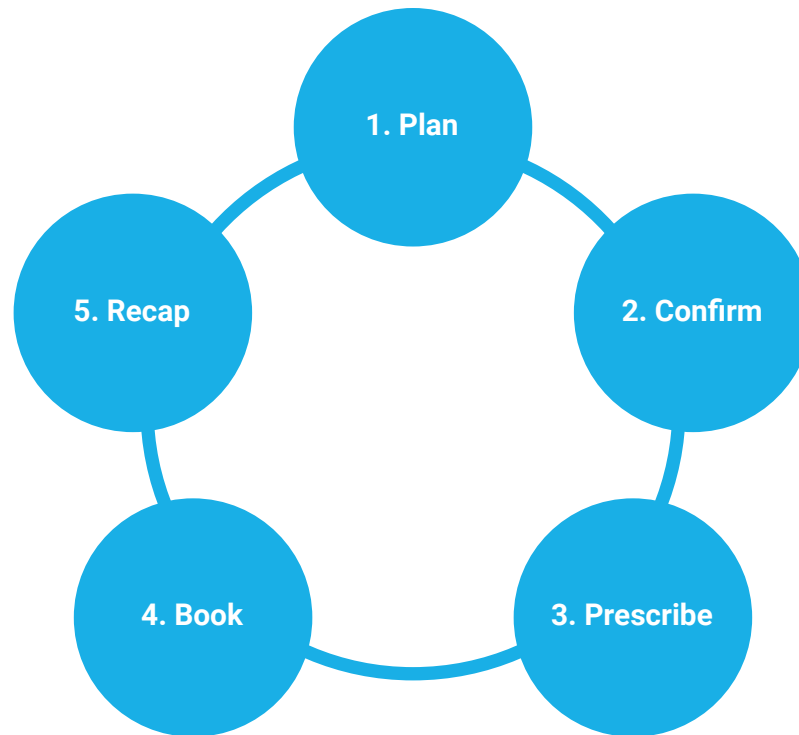
<h3>1. Set Expectations Early</h3>	<p>Clearly outline what will and won't be covered during the call.</p> <p>Example: "Today's focus will be on [specific topic]. Does that align with your priorities?"</p>
<h3>2. Involve the Right Stakeholders</h3>	<p>Ensure all decision-makers are present to avoid miscommunication later.</p>
<h3>3. Anticipate Objections</h3>	<p>Prepare responses to common objections before the call.</p>

Adversity Handling Checklist

- Acknowledge:** Did I validate the buyer's concern with empathy and understanding?
- Isolate:** Did I clarify whether this is the main concern or part of a broader issue?
- Answer:** Did I address the concern with tailored evidence and examples?
- Confidence:** Did I communicate my response with certainty and clarity?
- Alignment:** Did I confirm that my answer resolved their concern?

Key Takeaways for Navigating Adversity

- **Empathy First:** Make buyers feel heard before attempting to address their concerns.
- **Framework Matters:** Use the AIA framework to systematically handle objections.
- **Soft Skills Amplify Hard Skills:** Confidence, tone, and empathy are critical for success.
- **Proactivity Prevents Problems:** Anticipating objections and setting clear expectations reduces challenges.



Part 5: Driving Next Steps

Sales deals often falter due to a lack of clear direction. Part 5 focuses on the crucial skills, techniques, and frameworks needed to drive deals forward, ensuring momentum and reducing the chances of buyers going dark. Driving next steps involves guiding the buyer through the sales process with precision, empathy, and clarity.

What Does Driving Next Steps Mean?

Driving next steps refers to actively managing the progression of a sales deal by defining, aligning, and booking the next steps during every interaction. It involves using structured communication to ensure both parties are aligned on outcomes and expectations.

Key Challenges in Driving Next Steps:

- Buyers commit verbally but fail to follow through.
- Meetings end without clarity on what happens next.
- Stakeholders delay decision-making due to unclear action plans.
- Time gaps between interactions cause deals to lose momentum.



Step 1: Plan

Before the Call

Planning begins before the meeting. Decide what outcome you want by the end of the call and how you'll guide the conversation to achieve it.

Key Pre-Call Actions:

<h3>1. Define Your Goal</h3>	<p>What is the ideal outcome? (e.g., scheduling a demo, securing internal alignment, advancing to procurement).</p>
<h3>2. Anticipate Buyer Questions</h3>	<p>Prepare for objections or clarifications the buyer may need.</p>
<h3>3. Allocate Time for Next Steps</h3>	<p>Reserve 5–10 minutes at the end of the call for next-step planning.</p>

Checklist for Planning Next Steps:

- Have I identified the desired outcome for this call?
- Do I know what I want the buyer to do next?
- Have I prepared responses to likely objections?
- Have I allotted time at the end of the call for next-step discussions?



Step 2: Confirm

At the End of the Call

Before proposing next steps, confirm that the current meeting achieved its objectives. Buyers are less likely to move forward if they feel the previous step was incomplete.

How to Confirm

1. Ask Explicitly	“Did we cover everything you hoped to address today?”
2. Check Alignment	“Based on today’s discussion, do you feel like we’re heading in the right direction?”
3. Address Concerns	“Are there any questions or hesitations you’d like to discuss before we move forward?”

Example Script for Confirming:

You: “Before we talk about next steps, I want to make sure today’s meeting was productive for you. Did we address the key topics you were hoping to cover?”



Step 3: Prescribe

Take the Lead on Next Steps

As a sales professional, you are the “doctor” in the sales process. Buyers often look to you for guidance on what happens next. Be assertive and specific when outlining the path forward.

Why Prescribing is Important:

- Buyers may lack experience evaluating solutions like yours.
- A clear prescription eliminates decision fatigue and uncertainty.

Steps to Prescribe Next Steps:

<h3>1. Outline the Path</h3>	<p>Suggest the logical next action (e.g., scheduling a demo, involving additional stakeholders, reviewing a proposal).</p>
<h3>2. Explain the Why</h3>	<p>Provide context for why this step is important.</p>
<h3>3. Ask for Buy-In</h3>	<p>Confirm alignment before moving forward.</p>

Example Script for Prescribing Next Steps:

You: “The next step I’d recommend is a deeper dive into how our solution aligns with your team’s priorities. I’d like to schedule a demo next week with your technical stakeholders. This will help ensure we’re addressing all your needs. Does that sound like a good next step?”



Step 4: Book

Never Leave a Call Without a Calendar Invite

One of the biggest mistakes sales professionals make is leaving next steps undefined or waiting for the buyer to schedule the next meeting. Always lock in a time before the call ends.

How to Book Effectively:

1. Get Agreement on Timing	Narrow down a time frame during the call.
2. Check Calendars	If possible, have both parties check calendars on the spot.
3. Use Language That Assumes Commitment	“Let’s lock in Tuesday at 2 PM. Does that work?”

Script for Booking Next Steps:

You: “Let’s make sure we get this on the calendar while we’re both here. What’s your availability next week? How about Tuesday at 2 PM?”

Handling Pushback on Scheduling:

If the buyer hesitates to book a meeting:

You: “I understand you may need to check with your team. How about I pencil in a tentative time, and we can adjust if needed?”



Step 5: Recap

Summarize the Call and Next Steps

Before ending the meeting, recap the key points discussed and reiterate the agreed-upon next steps. A strong recap reinforces alignment and reduces misunderstandings.

Checklist for Recapping:

- Summarized the main points of the call?
- Reiterated the next steps and their purpose?
- Clarified any remaining questions or concerns?
- Verified that all stakeholders are aligned?

Example Script for Recap

You: “Just to recap, we discussed [key points]. The next step is to schedule a demo with your technical team next Tuesday at 2 PM. I’ll send over a calendar invite and include the materials we discussed. Does that sound good?”



Pro Tips for Driving Next Steps

<h3>1. Use Deadlines to Create Urgency</h3>	<p>Example: “If we want to hit your target implementation date, we’ll need to finalize this step by [specific date]. Let’s schedule now to stay on track.”</p>
<h3>2. Leverage Champion Communication</h3>	<p>Ask your internal champion to keep the deal moving within their organization. Provide them with resources or scripts they can use.</p>
<h3>3. Get Their Cell Phone Number</h3>	<p>“To make communication easier, let me give you my personal cell number. What’s yours?”</p>
<h3>4. Prepare for Pushback</h3>	<p>Have a plan for handling resistance, such as scheduling tentative meetings or setting clear follow-up expectations.</p>

Driving Next Steps Checklist

- Reserved time during the call for next-step planning?
- Confirmed the meeting achieved its objectives?
- Prescribed a clear and actionable next step?
- Booked the next meeting on the calendar?
- Recapped the discussion and verified alignment?
- Followed up with a calendar invite and summary email??



Templates for Driving Next Steps

Template for Follow-Up Email

Subject: Next Steps Following Today’s Meeting

Hi [Buyer’s Name],

Thank you for taking the time to meet today. As we discussed:

- **Key Takeaway 1:** [Summary of discussion].
- **Key Takeaway 2:** [Summary of discussion].

The next step is [specific action, e.g., scheduling a demo]. I’ve scheduled this for [date and time]. Please let me know if this works for you or if adjustments are needed.

Looking forward to continuing the conversation!

Best regards,

[Your Name]

Bringing It Home

This seems like a lot of information because it is. Trust me...from my days at Salesforce, to being a 5x sales leader, CRO, and now full time sales coach one thing has become very clear.

The difference between being average and elite is nuanced and is in the micro details like what I shared here.

If you found this guide helpful, imagine how much more you could achieve with personalized coaching tailored to your specific challenges and goals. I run a Software Sales academy with over 200 reps that are all experienced, but looking to take their game up a level. We're selective on who we work with because we're very hands on.

If you're in Software Sales and looking for hands on help to increase your results use the link below to book a call to meet with our team. We'll jump on a call and let you know if you qualify.

If that's not you I'm still rooting for you to make the most of the crazy thing called life.



[Book a Call](#)