Introducing the Outcome-Centric Selling® Toolkit
01: Introducing the Outcome-Centric Selling® Toolkit

Overview

This guide has two intended audiences: firstly, it is aimed at existing users of the Outcome-Centric Selling® system - helping you to understand when, how and where to use each of the tools to their best effect.

Secondly, it is aimed at sales leaders who are considering implementing the Outcome-Centric Selling® system within their own organisation - helping you to assess how the approach can enable you to achieve the improvement in sales performance that you are looking for.

Either way, we hope that this guide will help you to achieve your objectives.

Now, let's start at the beginning - with targeting.

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02: Outcome-Centric Targeting Tools

There are four key considerations when deciding where we can most effectively target our prospecting energies:

1. What are the **key business issues** that we can address more effectively than any other option?
2. What are the common characteristics of the **ideal customers** that are most likely to be motivated to address the issues we have chosen to target?
3. What are the **key roles** within these organisations that are most likely to be responsible for dealing with these issues?
4. What are the **key trends** and **trigger events** that are likely to cause these potential prospects to conclude that they have to urgently address the issue?

The **first three factors** help us to identify our **long-term prospects**: the **fourth factor** helps us to determine which of these prospects are likely to turn into **short-term opportunities**.

**Key Targeting Tools:**

02.1 Key Business Issues
02.2 Ideal Customer Profile(s)
02.3 Key Roles
02.4 Key Trends and Trigger Events
02.1 Key Business Issue Worksheet

Our targeting process must start by identifying the key business issues (as opposed to functional needs) that our organisation is particularly expert at addressing - preferably backed up by positive references and case studies.

These issues must be common (and important) enough across our target markets to make them worth focusing our energies on - there is little value in targeting uncommon or low-priority issues.

The key business issue worksheet enables us to identify and describe our prospective customer’s top-three common addressable business issues:

- How would our prospective customers describe the issue?
- Is the issue something they need to fix, avoid, or achieve?
- What are the typical symptoms and indications?
- What is the likely impact of the issue on both the organisation and the key stakeholders?
- What better outcomes are they looking for?

When, how, and where to use this tool:

- As an essential input into our territory and account planning processes
- To help us develop our prospecting priorities, messages, and campaigns
- As a high-level initial qualifier - does a potential opportunity suffer from any of the issues we have chosen to target?
02.2 Ideal Customer Profile Worksheet

Our ideal customer profile (or profiles) must capture the common characteristics of the organisations that are most likely to be suffering from the business issues we have chosen to target.

Our ideal customer profile will typically start with the typical demographic indicators of size, sector, and location, but to be effective it also needs to reflect:

- Key structural factors, such as organisational structure, their go-to-market model, their market focus, the systems they have in place, their strategic vendor relationships, the functions or departments we are targeting, and so on ...

- Cultural/behavioural factors, such as the way they make buying decisions, their relationship with suppliers, appetite for innovation, willingness to buy best-of-breed solutions, position on the adoption curve (early adopter, early majority, mainstream, laggard) and so on ...

- Current Priorities: their most important current strategic programmes and initiatives - for example, cost reduction, revenue growth, market share growth, digital transformation and so on ...

When, how, and where to use this tool:

- As an essential input into our territory and account planning processes
- To help us research and build our target account and prospect lists
- As a high-level initial qualifier - how closely does a potential opportunity reflect our ideal customer profile?
02.3 Key Roles Worksheet

Once we have established the key business issues we are going to target, and identified our ideal customer profiles, we then need to identify the key roles within these organisations that are most likely to be responsible for addressing the targeted issue(s).

These key project sponsors are likely to be senior business executives with operational responsibility for the departments or functions that are most affected by the issue(s). We need to identify their typical job titles, and anticipate their likely ...

- Primary responsibilities and key priorities
- Common business challenges
- Key internal relationships and influences
- Key external influences

... particularly as they relate to the business issues we have chosen to target.

We also need to be clear about how we deliver valuable outcomes to these key stakeholders.

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<thead>
<tr>
<th>Factor</th>
<th>Potential Ultimate Approver(s)</th>
<th>Potential Executive Sponsor</th>
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<td>Typical titles</td>
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<td>Primary responsibilities</td>
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<td>External influences</td>
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<td>How you deliver valuable outcomes</td>
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When, how, and where to use this tool:

- As an essential input into our account and opportunity planning
- To help us research and build our target account and prospect lists
- As a high-level initial qualifier - do our current contacts have the potential to play a key role in the customer’s decision and approval processes?
02.4 Key Trends and Trigger Events Worksheet

The final consideration when it comes to targeting are the key trends and trigger events that are likely to cause our potential customers to recognise that they need to change - and to act sooner rather than later.

There are three key categories of event:

- **Internal trigger events** - such as new senior appointments, new strategies, new initiatives, new investments, new product launches, and so on
- **External trigger events** - such as new legislation or regulation, new competitors, new technologies, one-off events and so on
- **Unavoidable trends** - these are typically long-term, profound changes in the business landscape whose impact can no longer be ignored or avoided

These trends and trigger events are the catalysts that cause prospective customers to recognise that they can no longer continue on their current path and that urgent action is required.

<table>
<thead>
<tr>
<th>Context</th>
<th>Example</th>
<th>Symptoms/Indicators</th>
<th>Who is affected?</th>
<th>How are they affected?</th>
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<td>Internal Trigger Events</td>
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<tr>
<td>External Trigger Events</td>
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<td>Unavoidable Trends</td>
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When, how, and where to use this tool:

- To identify key internal and external events that are affecting our target and existing customers and that we need to monitor and respond to
- To prioritise where our short-term pipeline building activities should be focused
- As a high-level initial qualifier - is there a powerful trend or trigger event that is driving the opportunity?
03: **Outcome-Centric Planning Tools**

The Outcome-Centric Selling Toolkit offers simple, effective easy-to-keep updated frameworks for **two key levels** of sales planning:

- An easily-sharable one-page overview of how you plan to **maximise the potential** of your **territory** that establishes the core principles and can be supported by whatever level of additional information is necessary.

- An easily-sharable one-page overview of how you plan to **maximise the potential** of each **key account** that can be supported by whatever level of additional information is necessary.

Unlike many traditional approaches to these types of planning, which are often done as a once a year exercise and rarely revised afterwards, both frameworks are intended to be **reviewed and updated on a regular basis** to reflect the inevitable changes in both the territory and account environment - as well as our own shifting priorities.

**Key Planning Tools:**

03.1  Territory Planning

03.2  Account Planning
03.1 Territory Planning

Our approach to territory planning is to summarise the most important elements on a single page, each of which can then be expanded as necessary.

- First, of course, we need to clearly define the boundaries of the territory - which might include geography, vertical market, product line, go-to-market-model, or any other relevant factors
- Then we need to accurately summarise - backed by evidence - our strengths, weaknesses, opportunities, and threats in the territory
- Based on this analysis, we then need to clearly articulate our top three objectives, strategies and tactics, and pipeline building initiatives
- We then need to identify our top three existing and target accounts in the territory, and our most important measurable objectives for each of them
- This needs to be supported by the work we have done to identify our key target issues, ideal customer profile, key roles, and key trends and trigger events

How, when, and where to use this tool:

- At the start of every new sales year, to align everyone around our focus and priorities
- Whenever circumstances change
- To help plan and prioritise our territory and pipeline development activities
03.2 Account Planning

Our approach to account planning is - once again - to summarise the most important elements on a single page, each of which can then be expanded as necessary.

- In addition to providing a brief account overview, the worksheet explores the alignment against the demographic, structural and cultural/behavioural aspects of our ideal customer profile
- We then go on to explore our importance to them, their importance to us, and our relationship with their executive leadership
- We then capture the account’s top three business priorities and how we contribute to them
- We then contrast our presence in the account against our key competitors, as well as identifying our opportunities/potential and our threats/risks
- In the light of the above, we then summarise our SMART objectives for the account, together with our key strategies and tactics

This can then be supported by further details including a stakeholder map, active opportunity plans, revenue analysis/projections and a tactical timetable.

When, how, and where to use this tool:
- When taking over responsibility for a new account
- At the start of each new sales year, and reviewed on at least a quarterly basis thereafter
- Whenever anything significant changes
- To help plan and prioritise our account development activities
The Outcome-Centric Selling Toolkit includes a number of carefully-crafted building blocks that are specifically designed to help salespeople assess and manage their significant sales opportunities:

- An opportunity review checklist designed to focus attention on the key things salespeople need to know and do in order to give themselves the best possible chance of winning the opportunity
- A continuously updatable opportunity qualification worksheet based on the IMPACCT framework - an evolved version of MEDDIC
- A continuously updatable stakeholder management worksheet designed to help salespeople identify, engage, and assess every key player in the decision and approval process
- A mutual success plan framework designed to help salespeople and key customer stakeholders to collaborate to ensure that the prospect’s desired outcomes are clearly understood and successfully achieved

Key Opportunity Management Tools

04.1 Opportunity Review Checklist
04.2 IMPACCT Qualification Worksheet
04.3 Stakeholder Management Worksheet
04.4 Mutual Success Plan Framework
04.1 Opportunity Review Checklist

The opportunity review checklist seeks to capture the current status of some of the most important factors that have been proven to have a significant impact on the outcome of every sales opportunity.

It highlights what the salesperson does and doesn’t know, and what they have and haven’t done, and includes:

- The evidence behind the close date
- The nature and status of the customer’s buying decision journey
- The current status of qualification and stakeholder engagement
- The current status of the customer-specific value proposition
- The salesperson’s strategy for winning the opportunity
- Potential risks and mitigations
- Any other key information
- Key next steps

When, how, and where to use this tool:

- As soon as an opportunity is first registered, to ensure we have a deep understanding of the circumstances
- To help us recognise what we still need to find out or confirm, and what we still need to do
- Whenever the customer’s circumstances change
- Before advancing the opportunity to the next stage
The IMPACCT opportunity qualification worksheet is based on an evolved version of MEDDIC - today’s most widely adopted qualification framework for complex B2B sales.

IMPACCT addresses 7 key qualification factors ...  
- Issues and Implications  
- Money and Economic Metrics  
- Authority and Influence  
- Process and Criteria (Decision and Approval)  
- Champion(s) (Approach and Project)  
- Competition (Options and Projects)  
- Timing and Urgency

... using a 5-point colour-coded scale ranging from very positive to very negative, but always initially defaults to “unknown”

Salespeople must justify their assessment of each factor and provide the evidence to support it.

When, how, and where to use this tool:

- Review all factors soon as a potential opportunity requires initial qualification
- Reassess all factors whenever our or the customer’s circumstances change
- Reassess all factors before advancing any opportunity to the next stage
04.3 Stakeholder Management Worksheet

The stakeholder management worksheet is designed to help salespeople identify, engage, and assess every key player in their prospective customer’s decision and approval process.

In addition to each stakeholder’s name and title, the worksheet guides salespeople in assessing:

- Their primary role in the decision process
- Their primary perspective - and how to best communicate with them
- Their influence over the decision
- Their attitude towards us as a vendor
- Their attitude towards the project as a whole
- How easy it is to access them
- The single most important thing they need to fix, avoid, or achieve
- The single most important way in which we create value for them

Salespeople are encouraged to rely on evidence, and not hope or assumption, when assessing each stakeholder.

When, how, and where to use this tool:

- Seek to identify and start to assess all the key stakeholders soon as a potential opportunity requires initial qualification
- Continue to reassess and better understand the already-identified stakeholders and seek out additional stakeholders throughout the lifecycle of the sale
The mutual success plan framework is designed to help salespeople and key customer stakeholders to collaborate to ensure that the prospect’s desired outcomes are clearly understood and successfully achieved.

In addition to capturing the customer’s primary desired outcome(s) and success metrics, the mutual success plan:

- Identifies the key members of both organisation’s outcome realisation teams
- Tracks the current stage of the customer’s decision journey
- Identifies and monitors the mutually agreed steps towards achieving the desired outcomes, who is responsible for them, and when they need to be accomplished

Note: the example on the right is a simple shared spreadsheet-based approach, but a growing range of on-line mutual success plan platforms are now available - ask us for recommendations.
05: Conversation Management Tools

The Outcome-Centric Selling toolkit provides a range of support to help salespeople to plan, prepare and successfully manage value-creating customer conversations - and to leverage these conversations to progressively craft compelling value propositions that are specific to each customer’s circumstances.

The building blocks include:

- A customer-specific value proposition framework that will ultimately provide the basis for the executive summary of your proposal
- A conversation planning workbook designed to create meaningful value for every participant
- A SPINCycle questioning framework designed to ensure that every question we ask is valuable
- A frequently asked questions workbook designed to help salespeople prepare to answer the customer’s common predictable questions
- A shareable anecdote framework designed to help create a pool of compelling, relevant stories

Key Conversation Management Tools

05.1 Customer-Specific Value Proposition Framework
05.2 Value-Creating Conversation Planning Workbook
05.3 SPINCycle Questioning Framework
05.4 Frequently Asked Questions Workbook
05.5 Shareable Anecdote Framework
05.1 **Customer-Specific Value Proposition Framework**

When organisations refer to their “value proposition”, this typically takes the form of a **generic message** aimed at a **wide target market**. Whilst these can be useful in initiating an **early-stage conversation** with a prospective customer, their generic nature makes them **progressively less useful** as the sale evolves.

If we are to **win the customer’s business** and **deliver the outcomes** they are looking for, we need to craft **specific responses** to the 4 **key questions** every customer **asks themselves**:

- **Why** do we need to **change**, rather than **continuing on our current path**?
- **Why** do we need to **act now**, rather than **later**?
- **Why** should they choose **us**, rather than **any other option**?
- **Why** should they **trust** us - to ensure that **their desired outcomes are achieved**?

For as long as our customer is **less-than-completely satisfied** with **any** of the answers, they are likely to “do nothing” and stick with the status quo.

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**When, how, and where to use this tool:**

- **Early on** in the sales process/buying decision journey, to establish the **current strength** of each of the answers
- **Progressively** throughout the sales process, to develop and test the strength of the answers
- As the foundation for the **executive summary** of our **formal proposal**
If a conversation is worth having, then it is worth **preparing** and **planning** for - and it will be most productive for all participants if it follows an **appropriate framework** (whilst allowing all points of view to be heard).

The **essential building blocks** of a value-creating conversation include:

**Before** the conversation
- Preparing the ground

**During** the conversation
- Setting the scene
- The core of the conversation
- Agreeing the conclusions

**After** the conversation
- Following up/analysing the outcomes

The **value-creating conversation workbook** offers a **structured yet flexible framework** for planning, preparing, and managing productive customer conversations that leaves every participant thinking “that was a good use of my time”.

### When, how, and where to use this tool:

- As a **visual checklist** and **reminder** prior to every customer conversation
- As a **written plan** prior to particularly significant conversations, particularly where **colleagues** are expected to participate, and you need everybody to be “**on the same page**”
- As a **guide** to running a productive meeting or conversation
05.3 SPINCycle Questioning Framework

No prospective customer enjoys being asked a series of often irrelevant-to-them “discovery” questions that merely demonstrate that the salesperson has failed to respect the prospect or prepare properly for the conversation.

The SPINCycle questioning framework helps to ensure that the customer has space to speak, interwoven with intelligently chosen insights, anecdotes, and a thoughtful blend of relevant value-creating questions:

- Minimising the number of situational questions by ensuring salespeople do their research in advance
- Uncovering the problems the customer is suffering from, with a focus on business issues and not just functional needs
- Exploring the impact and implications of the issues the customer has acknowledged
- Helping the customer to recognise for themselves the need and value of addressing the issue
- Asking commitment questions that help to confirm the agreed next steps

When, how, and where to use this tool:

- As a collective exercise across sales and marketing to come up with the most appropriate and powerful questions to ask in common sales situations/scenarios
- To come up with an appropriate and relevant balance of questions to ask when preparing for a given customer conversation
- To avoid asking questions the customer is likely to regard as irrelevant, disrespectful, or patronising
05.4 Frequently Asked Questions Workbook

The most experienced salespeople have usually worked out how to best answer their customer’s common or predictable potentially-tricky questions through a combination of insight, empathy, trial-and-error, and personal experience.

Unfortunately, their less-effective and less-experienced colleagues often struggle to respond to these same questions and can find that their progress ends up stalling as a result.

That’s where a collectively-sourced frequently-asked questions workbook can prove invaluable - it reflects the accumulated wisdom of the entire sales organisation, and not just each salesperson’s individual experiences.

This is one of a number of examples - the SPINCycle questioning framework is another obvious one - where salespeople can learn from each other.

The resulting collection of frequently asked questions can be hosted on the organisations’ sales enablement system or shared file repository.

When, how, and where to use this tool:

- As a collective exercise across sales and marketing to come up with the most effective answers to our customers’ most predictable questions
- To prepare for an upcoming conversation by reviewing the potential best answers to the prospective customer’s most likely questions
05.5 Shareable Anecdote Framework

It’s often observed that many top salespeople are also amongst the most effective storytellers.

Rather than “pitching”, they build rapport and gain the confidence of their prospects by sharing relevant anecdotes that reflect the experiences of other similar customers.

Fortunately, this is a skill that can be learned, and when salespeople share their favourite anecdotes with their colleagues the whole organisation benefits.

The key elements on an effective anecdote include:

- A customer situation and experience that the listener can relate to
- A recognisable complication that had been preventing that customer from achieving their desired outcomes
- A turning point that took advantage of our unique approach and perspective
- A positive resolution and outcome, plus an unanticipated or unexpected benefit

When, how, and where to use this tool:

- As a collective exercise across sales and marketing to capture and share the most powerful customer stories and anecdotes
- To prepare for an upcoming conversation by familiarising ourselves with the anecdotes that could most effectively support the messages we are trying to convey
When many sales organisations talk about their “sales process”, they are typically referring to a series of linear, non-reversible steps each salesperson is expected to follow in order to convert a prospect into an order - often including stages based on a specific sales activity such as “qualifying”.

But in the real world, the customer’s actual buying decision journey is far more complicated. They are more likely to think in terms of (for example) “selecting” or “verifying”. More importantly, their journey is rarely linear - from any point, they can move forwards, backwards, go around in circles or abandon the journey altogether.

And their buying journey also looks very different depending on whether they ultimately actually buy anything is inevitable or discretionary, and whether they are embarked on what they see as a familiar or an unfamiliar decision process.

Rather than a single rigid sales process, sales organisations need a flexible framework to accommodate all these variations.
06.1 Customer Decision Journey Checklist

Traditionally, most sales organisations have defined their “sales process” in terms of a linear one-directional sequence of stages and/or actions that salespeople are expected to follow when managing a sales opportunity.

Recently, more enlightened sales organisations have decided to reflect the customer's buying decision journey in their approach to opportunity and pipeline management.

This involves defining pipeline stages in terms of the key phases in the buying journey, recognising that the process can go backwards as well as forwards, and seeking to anticipate and observe:

- What the prospective customer is likely to be thinking and doing during each phase
- What the salesperson needs to know and do during each phase
- Typical customer indicators/verifiers
- Phase-relevant qualifiers
- Progress milestones and exit criteria

When, how, and where to use this tool:

- As a catalyst for developing a customer-journey-centric sales process that includes customer-activity-based milestones
- To help salespeople to anticipate what their prospect's priorities are likely to be during each phase of their buying decision journey
06.2 Buying Behaviour Guidelines

Each customer’s buying decision journey looks very different depending on whether the decision to buy something is inevitable or discretionary, and whether they are embarked on what they see as a familiar or an unfamiliar decision process.

When a purchase is inevitable, then the salesperson can focus on promoting the advantages of their approach over all other options - but when the purchase is discretionary (i.e., it may never happen), then the salesperson must also sell the need for change.

When the customer regards their decision process as being very familiar, they are likely to think that they do not need to engage vendors directly until late in the process, but when they recognise that they are entering unfamiliar territory, they are more likely to be open to seeking advice earlier in the process.

These two dimensions have a huge impact on how the customer manages their buying decision journey, and on how salespeople should seek to engage with them.

When, how, and where to use this tool:

- To help salespeople to diagnose the specific nature of each customer’s buying decision journey
- To guide salespeople in how they need to manage the different types of buying decision journey
You may also find the following eBooks and guides helpful:

**Mastering Outcome-Centric Selling** offers a comprehensive introduction to the essential building blocks of Outcome-Centric Selling®.

It is recommended reading for any business executive, sales leader or salesperson who wants to learn more about the concept and to see how to put the principles into practice.

The guide explains why having an outcome-centric perspective is so relevant to today's increasingly complex B2B selling and buying environments.

**Qualifying With IMPACCT** is the essential guide to the IMPACCT opportunity qualification framework - an evolved version of MEDDIC, and a key building block of the outcome-centric selling approach.

To download these and many other useful resources, please visit the resources page of the Inflexion-Point website at [https://www.inflexion-point.com/resources](https://www.inflexion-point.com/resources)
In Conclusion

We hope that this guide has helped you to better understand and appreciate the power and potential of both the outcome-centric selling approach and its supporting sales toolkit.

If you are an existing individual or corporate customer of Inflexion-Point, you are entitled to have direct access to the relevant sales tools in a customisable format that allows you to tailor each tool to your organisation’s specific circumstances and requirements.

If you are a potential individual or corporate customer, we would be pleased to explain your options for licensing the sales toolkit and the associated training programmes.

To find out more, please email us at info@inflexion-point.com or book a zoom call. We look forward to the conversation.