IS THE DEAL REAL?

A mutual action plan check for your top three deals



Kaveh Pazooki
Founding Account Executive, Surfe. Previously Datadog, Rippling, Salesforce

> Kaveh doesn't take the champion's word for it. He checks whether the prospect is doing their side of the plan: **"It's really used as a lie detector. I think it vets whether or not the deal is real."**

MONDAY MORNING: AUDIT YOUR TOP THREE ACTIVE DEALS

Deal	Mutual action plan in place?	Prospect has deliverables on it?	Have they executed on them?	Gaps to raise at forecast
	☐	☐	☐	
	☐	☐	☐	
	☐	☐	☐	

NO ACROSS THE BOARD?

PARK IT OUTSIDE THE QUARTER

It's not a healthy deal. Bring the gaps to your forecast meeting, and strategize with your boss on how to mitigate the risk.

HOW KAVEH TEES IT UP WITH THE CHAMPION

"I'm gonna owe you some stuff and … there's some homework that you're gonna have to do. Are you comfortable?" Keep the plan dynamic and amend it as the deal changes.

PUT CHECKPOINTS IN THE PROOF OF CONCEPT

Step 1
A check-in with the evaluators from the demo

Step 2
A formal check-in midway through

Step 3
A readout at the end

NAME EVERY STAKEHOLDER

Evaluators _____

End users _____

Security & procurement _____

Economic buyer _____

Prospect deliverables should include the inputs for the **ROI analysis** you'll present to their boss.

RED FLAGS THE DEAL ISN'T REAL

- Asked who the economic buyer is, the champion won't say.
- The champion says they'll present it internally.
- "Everything's great," and you're seeing it through rose-colored glasses.
- The plan lists only what you owe them.

THE FIVE-MINUTE ONE-ON-ONE

After a large demo, book five-minute one-on-ones with the end users, framed as onboarding training. Ask:

Ask
What's working so well with your current tool?

Ask
What would make you hesitate to switch?

You find pain your first contact never had, and it goes into the ROI analysis for the executive at the end.

HEAR THE FULL CONVERSATION

Pipeline, Episode 2, with host Joseph Lewin

thepipelinepodcast.com/e2