Qualify Your Way to Better Sales

ALTIFY

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Introduction

Sales qualification, often overlooked as a mere preliminary step in the sales process, is actually a cornerstone of successful account planning.

It's the meticulous process of identifying and evaluating potential customers to determine if they are a good fit for your product or service. In the realm of account planning, where long-term relationships and strategic partnerships are paramount, sales qualification becomes even more critical.

Imagine investing significant time and resources into a client relationship, only to discover that they lack the budget, authority, or need for your offering. Not only does this waste precious time, but it can also damage your reputation and erode your team's morale. Effective sales qualification acts as a filter, ensuring that your efforts are focused on prospects who are not only likely to buy but also align with your company's goals and values.

In this eBook, we'll be highlighting the stories of real sales leaders who have used rigorous sales qualification practices to grow revenue in key accounts and build lasting relationships with their most strategic accounts.

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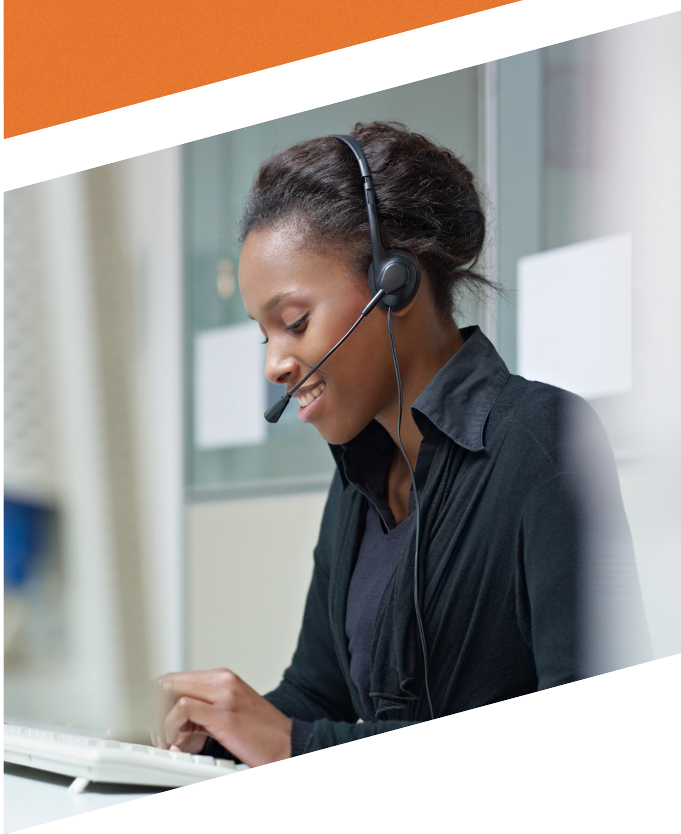

01

The Ins-and-Outs of Sales Qualification

What is sales qualification?

Sales qualification is the process of identifying and evaluating potential customers to determine if they are a good fit for a company's products or services. It's a crucial step in the sales process that helps revenue teams prioritize their efforts and increase their chances of closing deals.

Sales qualification is integral to account-based selling

If you need an easier way to understand how sales qualification works, think about it within the confines of account-based selling. Account-based selling is all about narrowing your list down to a group of target accounts, and then pursuing those accounts. But how do you discern if an account is a good fit?

You need to qualify it.

Here are the steps to take to better sales qualification:

Sales qualification 101 – the secret to bigger, better deals

When it comes to sales qualification, what's your philosophy? The more the merrier? Or do you take a rigorous approach to how you qualify your opportunities?

Your sellers' time and resources are finite. There's simply no way around it. This means that for every action a rep takes, there are many other possible actions they're not taking. Consciously or not, every deal you chase is a decision to knock on one door at the expense of another.

Rigorous qualification is a foundational pillar of account planning because it's the only way to focus your attention on building real, mutually beneficial relationships. It's all about finding the deals that matter so you can have the maximum impact for both your business and your customer.

If you aren't already heavily invested in a rigorous sales qualification discipline, this ebook will hopefully convince you of why you should be. We'll be diving into stories from real sellers who have seen huge wins from heavily qualifying deals, and creating an environment where sellers feel safe saying "no" to a deal if it isn't worth chasing.

Sarah Walker's approach to sales qualification

The key heroine for our story is Sarah Walker, Former Director, Corporate & Public Sector BT Group in the United Kingdom. Featured in our book, *Not Just Another Vendor*, Sarah Walker learned firsthand the importance of better sales qualification. Achieving the seller's dream of bigger, better deals rarely means more deals. Instead, it often means less deals – focusing on the opportunities and relationships that really matter.

The path forward seemed clear to Sarah. The biggest wins wouldn't come from the lowest-hanging fruit. Deals with real teeth could only result from taking a more thoughtful interest in how they could make a real difference for their customers.

Sarah called her team together. She related the story of her success with a recent deal and how she'd taken a step back, thought bigger, and ultimately been handsomely rewarded for her efforts.

"Yes, you might be successful now, chipping away at the low-hanging fruit," she told them. "But if we want to make a difference long-term, there are important extra things we can do."

It's difficult for sellers to turn down opportunities

Sarah figured that her win would have her team members lining up to follow in her footsteps. "I assumed that when I became a leader, I could just turn up and tell people how I'd been successful and then they'd all mirror that," she says with a laugh. "But I very quickly learned that this just isn't how leadership plays out."

Her sellers might have appreciated that she had a point, but it didn't mean they were convinced to change their approach. For those who were reliably hitting their quotas, the idea that they should start thinking more broadly and creatively seemed unnecessary at best and risky at worst. Taking a more deliberate approach with one customer would mean passing on the chance to score faster wins elsewhere.

"It's a very difficult thing for a salesperson to proactively walk away from a sale, particularly when they're chasing targets," Sarah says. But she wasn't willing to let the idea go. The way she saw it, sales effort couldn't be measured in wins alone. After all, chasing deals isn't free.

Pursuing opportunities always comes with a cost

"It's easy to negate the fact that the cost-to-bid and cost-to-pursue are incredibly significant causes of burnt resources for any sales organization," she explains. Thinking more critically about which deals they chased and how they chased them might do more than just get them bigger contracts, she reasoned: it might make them more efficient, too.

Her sellers might not have been jumping at her suggestion to be more intentional in the way they approached opportunities, but Sarah wasn't deterred.

One of her biggest priorities wasn't to force people to change their ways or come down hard on people who weren't doing what she felt was best. Instead, she threw her energy behind creating an environment that would encourage the behavior she wanted them to embrace.

Creating an environment where sellers are free to say "no"

"I wanted my team to be a safe place where someone could come and tell me, 'I don't think we should pursue this bid' without worrying that my reaction would be, 'Well, you aren't on target so if you aren't going after this bid, what are you doing?'"

On the contrary, Sarah knew open conversations about whether or not pursuing a bid was the right move were crucial to achieving her vision. "There is so much value in having conversations around the qualification process and understanding the seller's decision not to bid," she says.

The secret to effective account planning is sales qualification

Chasing a high number of smaller, transactional deals might help a seller hit their quota for the quarter, but it won't create the kind of long-term partnerships that move you out of the status of being "just another vendor" and pay off in the long term.

When you select which deals to pursue carefully, however, you can hone in on the opportunities in which you're best positioned to help your customers succeed. Then, you can go all-in on aligning an account team, building an extensive roster of relationships, and becoming a strategic partner to your customers.

In other words, you'll have the time, resources, and focus to do real account planning.

Selective investment is a winning strategy

Sarah isn't alone in her beliefs. Alison Greenwood, Regional Vice President and General Manager at Lumen, says that selective investment is almost always a winning strategy. "When you reduce the number of opportunities you're chasing, your win rate should increase," she said.

"Sellers can get a little bit optimistic," she adds. "We think that because we have all these features and because we have the right price, the customer will want our service. In reality, we need to be much more disciplined about getting deep into their business and deciding how to compete—and whether to compete at all. That, I think, is the foundation of account planning."

Account planning, as we all know by now, is rooted above all in putting your customer first. It requires teams to consider where and with whom they can have the greatest impact over the long term rather than where they can score a quick win.

Account planning only works when you invest real attention in your relationships, which can't be done if you're chasing every minor opportunity that comes your way. You have to take a bigger-picture, more thoughtful approach.

Sometimes, you have to say "No" to say "Yes."

Outcomes of good sales qualification include:

- Higher win rate percentage
- Bigger deals
- Shortened sales cycles with better ROI for your team's time and energy
- Better opportunities.

These outcomes come together in the ultimate success metric, called Sales Velocity, resulting in happier customers who get the attention and right-sized solutions that fit their strategic goals.

Put simply, when you only go after deals you can (and should) win, you can confidently invest your time, effort, and resources into winning them.

Need more convincing? Sometimes it's more helpful to put these things in numbers. Sarah Walker had real tangible results from an effective sales qualification process. **Here's the incredible wins she had from qualifying her way to better sales:**

65%
Growth

3X
Funnel Improvement

2X
Win Rate

100+
NPS Points

Steps to building a strong culture of sales qualification

Set clear, short-term metrics

To keep her team on track, Sarah focused their attention on the kinds of performance metrics that indicated long-term success.

“If we believed in our plan and we had clear milestones, we’d know whether we’re progressing and could redefine what success looks like,” says Sarah.

“Thinking long-term didn’t mean we were just waiting for a contract to land in two years. It was about creating the kinds of near-term proof points with metrics that kept people motivated and confident that they were doing the right things.”

Don’t make sellers afraid of saying “No”

Sarah knows that you can’t ask people to turn away from short-term gains unless you make them feel safe doing so. “The safety of the environment for people to talk about their customers, their planning, and their opportunities is really, really important,” she says.

“If they think they’re coming to a deal clinic to be judged on what they don’t know rather than having a chance to talk about their ideas and gather feedback and insights from other people, you’ll never get that opportunity to really qualify and optimize what each opportunity can do.”

Balance science and art

“Everyone should look at sales through both the science and the art,” Sarah says. “Because there is a real value in ensuring the two work in parallel.”

“You could follow really rigorous qualification processes, but not think about how you present and turn up for your customers,” she explains. “Alternatively, you could have really polished content but not be methodical in the way that you go about qualifying and planning. And I think those two, hand in glove, have to be part of any sales culture. Both have to be top-of-mind.”

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Four Integral Questions to Ask About Sales Qualification

Luckily when it comes to sales qualification, you don't need to spend time fumbling in the dark for the right questions to ask. Use these tried and true questions to start qualifying your way to better deals today, based on what's worked for Sarah.

01

Is there an opportunity?

This question may seem counterintuitive, but it's often overlooked, particularly when you're trying to expand within an existing account. What may look like a great path toward a more expansive relationship might end in a sneakily disguised dead-end if you don't know what to look for.

Here's what you need to figure out before going all in:

Is this initiative a priority for the customer?

Your customers are being pulled in a million different directions with unending wish lists of things they'd like to pursue. Is your project among the most important on the list? It's not always easy to tell.

To find out, you'll need to figure out where and why the project began. Most importantly, you'll want to pinpoint which executive is backing the idea and whether you have an existing relationship. If there's support from on-high, you're far less likely to see interest fade.

Do we understand their goals?

What is your customer trying to do? What's stopping them from getting there? If the objectives are vague, you may be better off steering clear.

Do they have access to cash?

If there's no funding, there's no deal. Projects backed by executives and linked to key strategic objectives are the most likely to get the funding they need.

Is there a compelling event?

Why is the customer in the market for your solution right now? Is there a time-sensitive external or internal pressure? Is that pressure connected to key players within the account? Do they need to take an action, make a decision, solve a problem, or take advantage of an opportunity by a particular date?

Most importantly, have we validated these insights with the customer?

This is a critical question because answering it gives us insight into:

- Why they need to act
- The consequences of inaction
- Who is ultimately responsible for the outcome

Account planning is all about aligning with our customers' goals. Knowing not only what the customer seeks to achieve but also how important they consider that objective to be is essential information when deciding whether a deal is worth pursuing.

02 Can we compete?

Art and science come together in this question. Determining how well you're positioned is a hybrid of technical capabilities and positioning. To answer this question, you'll need to consider:

What are their formal decision criteria?

How will your potential customer evaluate their options? What "must-have" parameters define their search? Do you fit them? Do you even know what they are? If you don't have that information, it might be a red flag with regard to the quality of the relationships you've built within the account.

Does our solution fit?

This question is black-and-white: an answer of "Yes" must link to those formal criteria.

Beyond that, though, it's valuable to know what key players within the organization consider to be their "must-haves." Match what's most important to who's most important. If you can do that, you'll be able to differentiate yourself and your solution.

Do you have a track record with this customer?

Have you worked with key people within the account before? What about suppliers? Partners? Are there previous projects either with this particular group or elsewhere in the organization that you can point to as grounds for trust?

What is your unique business value?

What do you have—that you know is important to the customer—that only you can provide? Be able to make a case for:

- What you're going to do
- Why it will help the customer rise to the challenge or opportunity presented by their compelling event
- How much it will impact their business (ROI)
- Proof you will be able to offer to measure success

03

Can we win?

The size of the deal and the significance of the logo mean next to nothing if you don't stand a chance of winning in the first place.

Assessing this chance comes back to relationships.

What do power and influence look like within the organization?

One of the biggest reasons sellers lose deals is that they don't have access to people who can actually buy. You'll need to do some investigative work to uncover how power really flows within the organization.

Do we have support?

Will key players back and sell for us when we aren't there? Do we have people who will give us important information that we can use to advance the deal?

Do we have access to executives?

It's an often overlooked but supremely valuable piece of the puzzle.

What are their informal decision criteria?

There are technical specs, sure, but there are also less tangible influences on decision-making. How do decisions really get made? What isn't spelled out in the RFP?

04 Is the deal worth winning?

You can't chase everything that comes across your desk.

Sometimes, you'll want to pass on an opportunity in favor of a more important pursuit. To separate the wheat from the chaff, ask your team:

- Will we be successful with this project?
- Will it be valuable for our customer? For us?
- Will it help us do more with this customer in the future?
- Are our cultures compatible?

There's a wide range of businesses out there, from highly structured bureaucratic organizations to those that encourage an entrepreneurial spirit; collaboration-focused groups to companies that prioritize the individual. Generally speaking, the best customer relationships stem from internal cultures that align with one another.

Will this contribute to our strategic growth?

How will this deal fit within your long- and short-term goals? Will it help you...

- Reach new markets
- Keep out a competitor
- Grow within the account
- Grow your market share
- Open new revenue streams

Just because you can win a deal doesn't necessarily mean you should. If chasing something means pulling a seller away from a more fruitful investment of time and resources, or detracts from your purpose, culture, and focus, it can be more strategic to walk away.

These four key questions are best used to do more than simply qualify yourself in or out of a deal. At their most effective, these lines of inquiry can help you take a step back and consider how you might be able to make the deal in front of you more valuable for both you and the customer. In Sarah's experience, that meant taking an ill-fitting opportunity and growing it into a multi-deal partnership that allowed her to get ahead of competitors, influence RFPs, and spend her time on bigger, better deals.

We are Altify.

Altify is the Account Planning AI Cloud helping sales teams grow revenue by planning smarter.

Altify was founded on a core belief: **strategic B2B selling puts the customer at the center**. We know sales success isn't just about selling something—it's about **creating mutual value**, which demands a solid plan.

Our mission is to shape the next generation of sales leaders. We equip revenue teams with **proven methodology, best practices, and a structured sales process**, fostering a customer-first mindset to strengthen relationships and win more opportunities.

Altify is not just software, but rather full-service sales transformation, powered by software. Our expert team helps sales organizations build and scale successful, tailored methodology-backed programs, with wholistic support from **sales strategy and training to technical implementation**. We ensure long-term customer value, proudly helping the world's best sales teams deliver unparalleled results.

See how Altify can transform your revenue operations at altify.com

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