B2B SALES FIELD SYSTEM

The 90-Day Quota Playbook

For new and mid-level B2B reps — years 0–3 — who need to hit a number with mechanics, not motivation.

No mindset work. No theory. One system for who you call, what you say, and what you do next.

SEVEN MODULES · EIGHT PRINTABLE ASSETS

CONTENTS

What’s inside

START HERE

How to use this

Three things to do in order. They take about an hour in total, and they decide whether the next ninety days produce a number or a pile of notes.

1. **Read Module 0 first, and fill in the Quota Math Worksheet before anything else.**

   Module 0 turns your quota into a daily number and tells you which part of your chain is actually broken. Asset 1 in the Asset Pack is the worksheet. Fill it in with your own numbers before you change a single behavior — every module after it exists to move one of those numbers.

2. **Work the modules in order — they are sequenced to a 90-day run.**

   Module 6 phases them: days 1–14 the list and the opener, days 15–45 the sequence at volume, days 46–75 discovery discipline, days 76–90 deal discipline. Installing all seven at once is the most common way this fails.

3. **Print the Asset Pack and keep the cards visible.**

   The eight assets ship as a separate printable PDF. The opener card, the voicemail card and the discovery framework are meant to sit next to your monitor while you are on the phone — not in a folder you open once.

Every module ends the same way: a table of the failure modes that cause the symptom you are living with, and one thing to take from the module. If you only ever read those two blocks, you still have the system.

MODULE 0

The Quota Math

Your quota is a math problem, not a character problem.

Start here, even if you want to skip to the scripts

Almost every rep behind on their number is working hard on the wrong lever. They're told "make more calls," so they make more calls into a bad list with a broken opener, get the same result at higher volume, and conclude they're not cut out for sales.

This module does two things before you change a single behavior:

1. **Turns your quota into a daily number** — usually far smaller than you feared
2. **Tells you which part is actually broken** — list, script, volume, discovery, or deals

Twenty minutes here saves you a quarter of guessing.

Part 1 — Run the number backwards

Quota is a lagging outcome. You can't do anything to it directly. What you can do is work the chain that produces it, so you build the chain in reverse.

The chain

```
Quota
  ↓ ÷ average deal size
Deals needed
  ↓ ÷ win rate
Qualified opportunities needed
  ↓ ÷ meeting-to-opportunity rate
First meetings needed
  ↓ ÷ conversation-to-meeting rate
Real conversations needed
  ↓ × touches per conversation
Daily activity
```

Worked example

An AE with a **$240,000 annual quota**, so **$60,000 per quarter**:

STEP	MATH	RESULT
Deals needed	$60,000 ÷ $20,000 average deal	**3 deals**
Opportunities needed	3 ÷ 25% win rate	**12 opportunities**
First meetings needed	12 ÷ 50% meeting-to-opp rate	**24 meetings**
Conversations needed	24 ÷ 20% conversation-to-meeting rate	**120 conversations**
Dials needed	120 × 10 dials per conversation	**1,200 dials**
Per week	1,200 ÷ 13 weeks	**92 dials**
Per day	92 ÷ 5 days	**≈19 dials**

Nineteen dials a day. Not a hundred. That's the number that produces $60,000 — and it's a number a person can actually hit every single day without theatrics.

Use your own numbers, not these. Pull your last two quarters from your CRM: your real deal size, your real win rate, your real conversion rates. If you genuinely have no data yet, start with the figures above as placeholders, then replace each one as your own data comes in. Borrowed benchmarks are for getting started, not for planning against.

Part 2 — The two things this reveals immediately

1. Your quota is a math problem, not a character problem

Once the chain is written down, "I'm behind" becomes a specific, boring, fixable statement like "my conversation-to-meeting rate is 11% and it needs to be 20%." That's a solvable problem. "I need to want it more" is not.

2. The leverage is in the middle, not at the top

Look at what happens when you improve one rate instead of adding volume:

CHANGE	EFFECT ON REQUIRED DIALS
Conversation→meeting: 20% → 25%	1,200 → **960** dials (240 fewer)
Win rate: 25% → 30%	1,200 → **1,000** dials (200 fewer)
Deal size: $20K → $24K	1,200 → **1,000** dials (200 fewer)
Add 5 dials/day	1,200 → 1,500 dials, **more work for the same result**

A five-point improvement in one conversion rate is worth more than a 25% increase in effort. That's the entire argument of this playbook: **the opener in Module 2 and the discovery framework in Module 4 are quota levers, not soft skills.**

Part 3 — The lag nobody tells you about

Your pipeline has a cycle time. If your average deal takes 60 days to close, then the deals closing this month came from calls you made two months ago.

Two consequences, and both matter:

- **Activity today pays out later.** Fixing your process in week 1 shows up in closed revenue around week 9–12, not week 2. Reps quit systems in week 3 because they judge a 60-day machine on 20 days of data.
- **A pipeline gap is already baked in.** If you're 60 days from quarter-end with a thin pipeline, more dials won't save this quarter — only accelerating existing deals will. Diagnose which quarter you're actually working on.

Write your cycle time at the top of your worksheet. It tells you when to expect results and stops you from abandoning something that's working.

Part 4 — The diagnostic: what's actually broken

Find your symptom. The fix is a specific module, not more effort.

SYMPTOM	THE REAL PROBLEM	GO TO
Can't reach anyone; wrong titles; "not the right person" constantly	**List**	Module 1
You reach people, but they exit in the first 30 seconds	**Opener**	Module 2
Good calls happen, there just aren't enough of them	**Volume —** and only now is "more calls" the right answer	Module 3
Meetings happen but don't become real opportunities	**Discovery**	Module 4
Pipeline looks full but nothing closes; deals stall or ghost	**Deal management**	Module 5
It works some weeks and not others	**Consistency —** you don't have a system yet	Module 6

Pick one. Reps behind on quota try to fix everything at once and change nothing measurably. One lever, 90 days, measured.

Part 5 — The four numbers to track (and nothing else)

CRM dashboards give you forty metrics, which is the same as giving you none. Track these four weekly, by hand, in one place:

#	METRIC	WHAT IT TELLS YOU
1	Conversations had	Whether you did the work
2	Meetings booked	Whether your opener works
3	Opportunities created	Whether your discovery works
4	Cycle-time-adjusted pipeline added	Whether you'll hit next quarter

Metric 1 is the only one fully in your control, which is exactly why it's the one to protect on bad days. Metrics 2 and 3 are your conversion rates — they're the levers. Metric 4 is your early-warning system.

The rule: if metric 1 is healthy and 2 is weak, it's a script problem. If 2 is healthy and 3 is weak, it's a discovery problem. Two numbers next to each other tell you more than any dashboard.

Part 6 — The Quota Math Worksheet

One page. Fill it in now, before Module 1.

```
MY NUMBER
Quota (per quarter):                 $__________
Average deal size:                   $__________
Average cycle time (days):            __________

WORKING BACKWARD
Deals needed:            quota ÷ deal size        = __________
Win rate (last 2 qtrs):                             _______%
Opportunities needed:    deals ÷ win rate         = __________
Meeting→opp rate:                                   _______%
Meetings needed:         opps ÷ meeting→opp rate  = __________
Conversation→meeting rate:                          _______%
Conversations needed:    meetings ÷ that rate     = __________
Touches per conversation:                           __________

MY DAILY NUMBER
Total touches needed:    conversations × touches  = __________
Per week:                ÷ 13                     = __________
Per day:                 ÷ 5                      = __________

MY DIAGNOSIS
The one thing that's broken:          ______________________
The module I'm working:               ______________________
The rate I'm trying to move:  from ______% to ______%
I'll judge this on (date, ≥ cycle time from today): __________
```

THE ONE THING TO TAKE FROM THIS MODULE

You are not behind because you aren't trying hard enough. You are behind because one number in the chain is lower than it needs to be, and you probably don't know which one yet.

Now you can find out. Everything after this module exists to move exactly one of those numbers.

NEXT

Module 1 — The List

MODULE 1

The List

A perfect script on a bad list still fails. Fix the denominator before you fix the delivery.

Why this comes before the script

A perfect opener delivered to the wrong person fails 100% of the time, and it fails in a way that feels like a script problem. This is the most expensive misdiagnosis in sales: reps rewrite their words for months when the actual defect was who they were calling.

Module 0 gave you a daily activity number. This module decides where that activity goes. Get it right and your conversation-to-meeting rate — the highest-leverage number in your chain — moves without you changing a single word.

The three filters

An account is worth calling only if it clears all three. Two out of three is a wasted quarter.

Filter 1 — Fit

Would they get real value, and can they pay for it? Define this narrowly and in writing:

- Industry or segment
- Size band (employees, revenue, or whatever your product scales on)
- A technical or operational precondition (they run X, they sell Y, they have Z team)

The test: if you can't name three current customers who match the profile, you don't have a profile — you have a guess.

Filter 2 — Trigger

Something changed recently that makes this problem urgent *now*. Fit tells you they could buy someday. Trigger tells you they might buy this quarter.

No trigger means you're asking someone to solve a problem they've successfully lived with for three years. That's the hardest sale in the world and it's the one most reps default to.

Filter 3 — Access

Can you actually reach a person with the authority to care? An ideal-fit account with a triggered problem and no reachable owner is a fantasy, not a prospect.

Check before you call: is the role identifiable, is there a plausible contact path, and is there a second person you could reach if the first ignores you?

The twelve trigger events

All of these are findable free. This is your weekly list-building routine, not a one-time exercise.

#	TRIGGER	WHERE TO FIND IT	WHY IT MATTERS
1	New executive in the relevant function	LinkedIn, company newsroom	New leaders buy — they need visible wins in 90 days
2	Hiring for roles that imply your problem	Job boards, careers page	A job posting is a budgeted admission of a gap
3	Funding round or acquisition	Press releases, industry press	New money, new mandates, new scrutiny
4	Rapid headcount growth	LinkedIn headcount trend	Processes that worked at 40 people break at 100
5	New market or product launch	Company blog, press	Launches create urgency and expose weak systems
6	Competitor of theirs bought something similar	Vendor case studies, press	Peer proof is the strongest motivator in B2B

#	TRIGGER	WHERE TO FIND IT	WHY IT MATTERS
7	Public target or mandate stated by leadership	Earnings calls, interviews, podcasts	They've committed publicly — now they must deliver
8	Reorg or team restructure	LinkedIn title changes	New owners inherit problems they didn't create
9	Regulatory or compliance deadline	Industry press	Deadlines are the only trigger with a fixed date
10	Bad reviews or public complaints about the problem	Review sites, social	Documented pain, in their customers' words
11	Tech stack change	Job posts, engineering blogs	Migrations open adjacent buying windows
12	Champion changes companies	LinkedIn	Someone who already knows you, in a new seat, with new budget

Trigger 12 is the highest-converting one on this list and almost nobody works it. Keep a saved list of every person who ever engaged with you and watch for job changes. It's the closest thing to a warm cold call that exists.

Why 100 accounts beats 1,000

Reps build lists of thousands because it feels like preparation. It isn't — it's avoidance, and it produces shallow calls at scale.

A working list of **100 accounts** is the right size because:

- You can know something real about each one
- You can work the full multi-touch sequence rather than one-and-done
- You can tell the difference between "this list is bad" and "my script is bad," because the sample is controlled
- You'll actually finish it, which means you get data

The 100 doesn't shrink when someone says no. It gets replenished. One out, one in, weekly.

Tiering: A, B, and C

Not all 100 get the same treatment. Sort them and spend deliberately.

TIER	DEFINITION	SHARE OF LIST	HOW YOU WORK THEM
A	Perfect fit + active trigger + clear access	~20	Deep research, personalized first touch, multi-threaded from day one, full 5-touch sequence, worth 8+ touches
B	Good fit, weak or older trigger	~50	Standard 5-touch sequence, light personalization, one specific detail per account
C	Fit only, no trigger yet	~30	Low-effort nurture. Watch for triggers. Do not spend calls here.

> **The mistake to avoid:** treating everything like a B. A-accounts deserve an hour of preparation each and reps give them four minutes; C-accounts get called with the same energy and produce nothing. Uneven effort is the point.

Promotion rule: a C-account that fires a trigger becomes an A that week. That's what makes the list a living system rather than a spreadsheet you built once.

The 15-minute research standard

For A-accounts, before you dial. Do not exceed 15 minutes — beyond that you're hiding from the phone.

Find exactly three things:

1. **The trigger, specifically.** Not “they’re growing” — “they posted four roles in that team in the last month.”
2. **One thing in their words.** A line from a job post, an interview, a review, a blog. This becomes your problem statement in Module 2’s line 4.
3. **The second name.** Who else you’d reach if this person ignores you. Write it down now, while you have the tabs open.

That’s it. Three facts, fifteen minutes, then dial.

Disqualify hard and early

Remove from the list immediately:

- No identifiable owner for the problem
- Recently bought a direct competitor’s solution (revisit in two quarters, note the date)
- Below your minimum size band, no matter how friendly they are
- Two contacts have told you clearly that the problem doesn’t exist there
- You cannot articulate a trigger after 15 minutes of looking

Write the removal date and reason. In six months this log tells you what your real ideal customer is — and that’s a better ICP than any one your marketing team wrote.

The weekly list ritual (30 minutes, same time every week)

1. Remove everything closed, dead, or disqualified
2. Scan your trigger sources and add replacements to get back to 100
3. Re-tier: promote anything that fired a trigger, demote anything that went cold
4. Pick next week's 20 A-accounts and pre-write the three research facts for each

Thirty minutes protects the entire week's calling. Skip it and by Wednesday you're dialing whatever's in front of you, which is how quarters get lost.

> COMPANION ASSET · IN THE ASSET PACK
>
> **Account Tiering Template** — 100 rows with columns for: account, contact, second contact, tier, trigger, trigger date, the one thing in their words, touch count, last touch, next action, and disqualify date/reason.
>
> Plus the **12 Trigger Events Checklist** as a one-pager to run your weekly scan against.

Common failure modes

SYMPTOM	THE ACTUAL CAUSE
"Not the right person" constantly	Filter 3 — you never identified the owner before dialing
Good conversations, no urgency	Filter 2 — fit without trigger
List feels endless and you never finish	Too big. Cut to 100.
Every account gets the same call	No tiering — A-accounts are being underworked
The list is stale by Thursday	You skipped the weekly ritual

THE ONE THING TO TAKE FROM THIS MODULE

Your conversion rate is mostly a property of your list, not your personality. Fix the denominator before you touch the delivery.

NEXT

Module 2 — The Cold Call

MODULE 2

The Cold Call

Now that you know who to call and what's true about them, here's the opener, word for word.

The only job of a cold call

You are not trying to sell. You are not trying to book a demo. You are trying to earn **thirty more seconds**, then thirty more after that.

Reps fail on cold calls because they try to accomplish the whole sale in one breath, which makes them sound like exactly what the prospect is braced for. The system in this module does the opposite: it tells the truth immediately, asks permission, and gives the prospect a real exit at every step. Counterintuitively, that's what keeps them on the line.

Everything here is built on the same three moves from the objections deck — **agree, ask, stop** — applied from the first second.

The opener, word for word

Here it is in full. Read it once straight through, then read the annotations.

> **1.** "Hi — is this Sarah?"
>
> *(wait for the yes)*
>
> **2.** "Sarah, my name's [Your Name], I'm with [Company]."
>
> *(half-second pause — do not rush into the next line)*
>
> **3.** "I'll be straight with you: this is a cold call. Do you want to hang up, or can I have thirty seconds to tell you why I picked up the phone?"
>
> (**stop talking.** *Full stop. Let it be silent.)*
>
> **4.** "Appreciate it. I work with [role]s at [type of company], and the pattern I keep running into is [specific problem], usually because [specific cause]. It ends up costing them [specific consequence]."
>
> *(pause)*
>
> **5.** "Does any of that sound like your world, or am I way off?"
>
> (**stop talking again.** *This is the most important silence of the call.)*
>
> **6.** "That's helpful — thanks for being straight with me. Makes sense to put fifteen minutes on the calendar to see whether this is even relevant to you? I'll come prepared, and if it's not a fit I'll say so."

Six lines. Under sixty seconds. Nothing clever in it — and that's the point.

Why each line exists

Line 1 — "Is this Sarah?"

You're confirming you have the right human, but the real function is mechanical: it gets them to say one word out loud. A prospect who has spoken is measurably harder to hang up on than one who has only listened. Never open with "How are you today?" — it's the universal signal of a sales call and it costs you the next line.

Line 2 — Your name and company, then stop

Say it plainly and slowly. Reps machine-gun this line out of nerves, which reads as a script and triggers the reflex. The half-second pause after your company name does something specific: it signals you're not in a hurry, and people who aren't in a hurry don't sound like telemarketers.

Line 3 — "This is a cold call"

The most important line in the module. It works for three reasons:

1. **It's true, and they already know it.** Naming the thing they're suspicious of collapses their suspicion. There's nothing left to catch you at.
2. **It gives them a real exit.** "Do you want to hang up" is a genuine offer. Because you're not trapping them, they don't need to fight their way out — and the vast majority don't take the exit.
3. **It makes you the only honest call of their day.** That's your entire differentiation in the first eight seconds, before you've said one word about your product.

Then **you stop**. This is where nearly every rep fails. The silence feels endless and the instinct is to fill it with "...because I noticed on LinkedIn that..." Don't. The pause is not empty space; it's the request. Count to three.

Line 4 — The problem statement, not the pitch

Three components, in this order, and never more:

- **Problem** — what's broken, in the words they'd actually use
- **Cause** — why it's broken, which is what proves you've seen this before
- **Consequence** — what it costs, ideally in time or money

Notice what's absent: your product, your features, your funding round, your customer logos. You are describing their world, not your company. If your first thirty seconds could be delivered by a competitor without changing a word, it's a good problem statement — that means it's about them.

Write yours out and time it. Over thirty seconds means you have two problems in it. Cut one.

Line 5 — "…or am I way off?"

This is the agree-ask-stop pattern doing its work. Three things happen at once:

- **It's genuinely easy to answer.** You've given them an honest "no" option, so answering doesn't feel like a commitment.
- **It hands them control.** Prospects relax the moment they realize they can end this cleanly.
- **It's your discovery.** If they say "we've actually solved that," you've learned more in four seconds than a ten-minute pitch would have told you.

Then stop again. If you speak first here, you've thrown away the whole opener.

Line 6 — The ask

Three deliberate choices:

- **"Fifteen minutes"** — small, specific, and clearly not a demo
- **"Whether this is even relevant"** — a low-stakes frame; nobody is agreeing to buy
- **"If it's not a fit I'll say so"** — the disqualification promise, which is the single most disarming thing you can offer, because no other rep who called them this week said it

Handling the three responses to line 3

THEY SAY	YOU SAY
"Go ahead."	"Appreciate it." → straight into line 4. Don't thank them twice.
"What's this about?"	This is a yes with extra steps. "Fair question —" → straight into line 4.
"Not interested."	Use the deck: "That's fair — you don't know what I do yet. Can I give you one sentence, and if it's not for you, I'll never call again?"

If they actually hang up, mark it and move on. A clean, fast no is a gift; the deals that eat your quarter are the polite maybes.

Tone and pace (this matters more than the words)

- **Slow down.** Nervous reps talk 30% faster than normal. Deliberately drop your pace below conversational — it reads as confidence.
- **Drop your pitch at the end of sentences.** Rising intonation makes statements sound like requests for approval.
- **Smile on line 3.** It's audible, and that line only lands if it sounds like honesty rather than a tactic.
- **Stand up.** Unglamorous and it works.
- **Never apologize.** No "sorry to bother you," no "I know you're busy." Apologizing tells them the call was worth apologizing for.

Voicemail — the six-word ending

Most voicemails die on the last line, not the first. Never end with "give me a call back," which asks a stranger to do work for you.

> "Hi Sarah, it's [Name] at [Company]. Calling about [specific problem] — it's the thing I keep hearing from [role]s at [company type]. **I'll try you again Thursday morning."**

The six words: **"I'll try you again Thursday morning."**

It works because it removes the ask entirely, sets a real expectation, and — critically — you then actually call Thursday morning. Doing what you said you'd do is a competence signal before you've spoken a word to them. Reference it when you do: "Sarah, [Name] again — said I'd try you Thursday."

The gatekeeper ask

Treat the person answering as an ally with information, never as an obstacle to route around. They can hand you the meeting your manager couldn't.

> "Hi — I'm hoping you can point me in the right direction. I'm trying to figure out who owns [specific problem area] over there. Is that Sarah, or would it be someone else?"

Why it works: you ask for direction rather than access, you name a problem rather than a pitch, and the either/or makes answering easier than deflecting. Never claim a prior relationship you don't have — it burns the account permanently, and gatekeepers talk to each other.

The practice drill

You will not sound like this on your first call. That's fine. Do this instead:

1. **Record yourself** delivering the opener ten times. Listen to the pauses only, ignoring the words.
2. **Time your line 4.** Cut it until it's under thirty seconds.
3. **Rehearse the silences deliberately.** Practicing the words is easy; practicing not talking is the actual skill.
4. **Run 20 live calls before changing anything.** Reps rewrite their script after four bad calls and never learn whether anything works. Twenty calls is the minimum sample.
5. **Log one thing per call:** where the call ended. After twenty calls, the pattern tells you which line is leaking — and that's the only line to rewrite.

Common failure modes

SYMPTOM	THE ACTUAL CAUSE
They hang up during line 3	You rushed lines 1–2 and sounded like a robot
They say “just send me an email”	Your line 4 problem statement is generic — it could describe anyone
Long calls that never book	You never asked. Line 6 exists; use it.
Everyone is “not the right person”	This is a list problem, not a script problem — go back to Module 1
It works but you can’t repeat it	You’re improvising. Read the words as written for twenty calls, then adapt.

COMPANION ASSET · IN THE ASSET PACK

Cold Call Opener Card — the six lines on one printable page, with the pauses marked, sized to sit next to your monitor.

Voicemail Script Card — the voicemail with the six-word ending, plus the follow-up reference line.

NEXT

Module 3 — The 5-Touch Sequence

MODULE 3

The 5-Touch Sequence

The call is one touch. Most replies come on touch four, which is exactly where most reps have already quit.

The premise

One call is not outreach. It's a coin flip on whether a stranger happened to be free at that exact second.

Most replies land on **touch four**, which is precisely where most reps have already given up and moved on. That single fact is the entire reason this module exists: the sequence isn't about persistence as a virtue, it's about not throwing away the work you already did on touches one through three.

Every touch has a different job. None of them is "checking in."

The map

Ten business days. Five touches. Two channels plus one optional.

TOUCH	DAY	CHANNEL	JOB
1	Day 1	Call + voicemail + email same day	Announce the problem. Get on the radar.
2	Day 3	Email	Deliver something useful with no ask
3	Day 5	Call + LinkedIn	Different time of day than touch 1
4	Day 8	Email	The peer-proof touch — *most replies land here*
5	Day 10	Call + email	The honest close-out

Rules that make it work:

- **Vary the time of day.** Someone unreachable at 9am is often reachable at 4:30pm. Reps call the same slot five times and conclude the person doesn't exist.
- **Same-day call and email on touch 1.** The email makes the name familiar; the call makes it a person. Neither works as well alone.
- **Never send a touch that only serves you.** If a message's only purpose is "am I still on your list," delete it.
- **Ten business days, then out.** Move them to nurture and re-enter on the next trigger. Chasing forever is how you end up with 400 dead names and no time.

The four email templates

Short. Plain text. No images, no signature block bloat, no "I hope this email finds you well." Under 90 words each — if it doesn't fit on a phone screen without scrolling, it doesn't get read.

Template 1 — First touch (Day 1)

> **Subject:** [their trigger, 3–5 words]
>
> [Name] —
>
> Saw [specific trigger: four new roles on the ops team / the Series B / the launch of X].
>
> When that happens, the thing I usually hear from [role]s is [specific problem], normally because [cause]. Costs teams around [consequence].
>
> Worth fifteen minutes to see if that's your situation too? If it's not, I'll leave you alone.
>
> [Your name]

Why it works: the subject line is about them, the body proves you looked, and the ask is small with an exit attached.

Template 2 — The value touch (Day 3)

> **Subject:** the [X] thing
>
> [Name] — no ask here.
>
> Most [role]s dealing with [problem] get stuck on [specific sub-problem]. The teams that fix it usually [one concrete, genuinely useful insight].
>
> Might be useful whether or not we ever talk.
>
> [Your name]

Why it works: you give before you take. This is the touch that makes touch 4 land, and it's the one reps skip because it doesn't feel like selling.

Template 3 — The peer-proof touch (Day 8) ← the highest-reply touch

> **Subject:** how [similar company type] handled this
>
> [Name] —
>
> [Company type similar to theirs] had the same thing: [problem]. They were [old approach], which broke once [threshold].
>
> They changed [one specific thing] and got [specific result].
>
> Happy to walk through exactly how, or ignore this and I'll stop.
>
> [Your name]

Why it works: peer proof is the strongest motivator in B2B. Not your product — a company like theirs solving the problem.

Template 4 — The close-out (Day 10)

> **Subject:** closing the loop
>
> [Name] — I've reached out a few times and haven't heard back, which usually means one of three things: not a priority, not the right person, or terrible timing.
>
> Any of those is fine — just tell me which and I'll act accordingly.
>
> Otherwise I'll assume it's not a priority and leave it there.
>
> [Your name]

Why it works: this is the highest-reply-rate email in the entire sequence, and it's the one that feels most uncomfortable to send. The three named options make replying trivial, and "I'll leave it there" is a real deadline rather than a manufactured one. Do not make it passive-aggressive — no "guess you're not interested." Honest, then done.

The LinkedIn touch (Touch 3)

Not a pitch. Ever.

Connect with a note, one line:

> "[Name] — reached out on [trigger]. No pitch, just wanted to be a name you recognize rather than a random number."

Or, if they post publicly: **leave one genuinely useful comment** on something they wrote. Not "great post." A real observation that adds something. This is the highest-trust, lowest-effort touch available, and almost nobody uses it correctly.

> **Never:** connect and immediately pitch in the DM. It's the fastest way to be permanently ignored, and it poisons the account for whoever calls next.

Re-entry: no-shows and ghosts

The no-show

Send within 20 minutes, and stay light — annoyance kills the reschedule:

> "[Name] — looks like we got crossed up. Happens. Does [specific day, specific time] work better, or should I try you next month?"

The either/or gives them a graceful path and a real alternative. Never say "you missed our meeting." One reschedule attempt, then one more a week later, then back to nurture.

The mid-deal ghost

Someone who engaged and then vanished has almost always been overtaken by an internal priority. Don't chase — reframe:

> "[Name] — I'm guessing something bigger landed on your desk. Should I close this out for now and check back in [specific month], or is it still live?"

Giving them permission to say "close it" is what gets a reply. Half the time the reply is "no, still live, sorry — next week."

The re-trigger

The best re-entry isn't a follow-up at all — it's a new first touch on a **new trigger**. Someone who ignored you in March is a different prospect in September if they just hired a new VP. Reset the sequence, lead with the new event, and never reference the old silence.

What to track (feeds Module 0's metrics)

METRIC	WHAT IT TELLS YOU	WHERE THE FIX LIVES
Reply rate by touch number	Whether you're quitting too early	This module
Reply rate by template	Which message actually works	Rewrite the loser
Connect rate by time of day	When your people are reachable	Move your calling block
Sequence completion rate	Whether you're finishing what you start	Module 6

The single most common finding: reps discover they average 2.3 touches per account when they believed they were running five. The sequence isn't failing — it isn't being run.

> COMPANION ASSET · IN THE ASSET PACK
>
> **5-Touch Sequence Map** — the ten-day grid on one page, with each touch's job and channel. **4 Cold Email Templates** — copy-paste text with the fill-in brackets marked. **Re-engagement Messages** — the no-show, the ghost, and the re-trigger.

Common failure modes

SYMPTOM	THE ACTUAL CAUSE
No replies at all	Your first touch is about you, not their trigger
Replies only from touch 1	You're not finishing the sequence — check your real touch count
"Stop emailing me"	You sent touches with no value in them
Sequence takes all week to run	You're personalizing B and C accounts like A accounts (Module 1)
Good replies, no meetings booked	You're not asking. Every touch except 2 needs a clear ask.

> THE ONE THING TO TAKE FROM THIS MODULE
>
> **The touch you didn't send is the reply you didn't get.** Touch four is where the money is, and it's on the other side of the discomfort that makes most reps stop at two.

NEXT

Module 4 — Discovery That Prevents Objections

MODULE 4

Discovery That Prevents Objections

The sequence gets you the meeting. Discovery decides whether the meeting was worth anything.

The premise

Objections are not events that happen to you late in a deal. They are **debts you took on early** by not asking a question, and they come due at exactly the worst moment — usually right when you thought you were closing.

The free objections deck taught you how to handle the twelve most common ones in the moment. This module is the upstream version: ask five things correctly on the first call and most of those twelve never get spoken at all.

The difference in practice: a rep with good objection handling wins deals they should have lost. A rep with good discovery doesn't need to.

The map: every objection is a question you skipped

Look at this table before anything else. It's the whole module in one screen.

THE OBJECTION YOU GET LATE	THE QUESTION YOU DIDN'T ASK EARLY
"I need to think about it."	"What would you need to see to be confident this is the right call?"
"I need to talk to my team."	"Who else weighs in on a decision like this?"
"It's too expensive."	"What's this problem costing you today?"

THE OBJECTION YOU GET LATE	THE QUESTION YOU DIDN'T ASK EARLY
"We don't have budget."	"If it were clearly worth doing, where would the money come from?"
"We're happy with how things are."	"What made you take this call?"
"Send me a proposal."	"What has to be true for this to move forward?"
"Call me next quarter."	"What's driving the timing on your end?"
"We're already using [competitor]."	"What are you using today, and what would you change about it?"

Read the right column. None of those are clever. They're just questions that most reps skip because the call is going well and they don't want to break the mood.

Breaking the mood is the job. A comfortable first call that produces no answers is how deals die in month three.

The five questions

Five things must be answered before you agree to a second call or a demo. Not asked — **answered**.

Question 1 — The trigger

> "Before I get into anything — what made you take this call?"

Their answer tells you whether pain exists or you're a calendar accident. Ask it in the first three minutes, and shut up for the whole answer.

A real answer sounds like: a specific recent event. A new hire, a missed target, a system that broke, a mandate from above. **A weak answer sounds like:** "just curious," "always looking to improve," "my boss forwarded it." Weak answers aren't disqualifying yet, but they mean the pain isn't owned by anyone.

Question 2 — The current state and its cost

> “How are you handling [problem] today?” then: “And what’s that costing you — in time, money, or people?”

Two parts, always in that order. The first is easy and they’ll answer it happily. The second is the one reps flinch from, and it’s the one that kills “too expensive” three weeks later.

Push for a number. If they say “it’s a huge time sink,” ask: “Roughly how many hours a week, across how many people?” Then do the arithmetic out loud: “So call it 12 hours a week across four people — that’s most of a full-time role.” Now your price has something to sit next to.

If they can’t quantify it, the problem isn’t real enough to buy a solution for. That’s not a failure of the call; that’s the call working.

Question 3 — The decision criteria

> “If you were going to solve this, what would you need to see to be confident it’s the right call?”

This is the single highest-value question in the module. It gives you the scorecard they’ll actually judge you on — and it makes “I need to think about it” nearly impossible later, because you can return to their own words: “You told me you needed X and Y. Where do those stand?”

Follow up with: **“Which of those matters most?”** Criteria without priority is a list; criteria with priority is a map.

Question 4 — The decision path

> “Walk me through how a decision like this usually gets made there. Who else weighs in?”

Ask it as a process question, never as a “are you the decision maker?” question — that one is insulting and gets you a defensive lie.

Then go one layer deeper: **“And what does [that person] care about most?”** You are now selling to the room, not to the person. This is what prevents both “I need to talk to my team” and the champion-leaves disaster.

Question 5 — The timing and the alternative

> “What’s driving the timing on your end?” then: “And if this doesn’t get solved this quarter, what happens?”

The second half is the status-quo killer. If the honest answer is “nothing, we carry on,” you have a nice-to-have — price accordingly, forecast accordingly, and stop spending your best hours on it.

Order matters

Run them in this sequence:

```
1. Trigger        → is there pain, and is it owned?
2. Cost           → is the pain expensive?
3. Criteria       → how will they judge a solution?
4. Path           → who has to agree?
5. Timing         → what happens if they do nothing?
```

The logic: pain before money, money before process, process before people, people before deadlines. Ask about budget or authority before you’ve established cost and criteria and you sound like you’re qualifying them for your own benefit — because you are.

The trap: interrogation vs. conversation

Five questions delivered back-to-back is a deposition. Three things fix it:

1. Label the plan up front.

> "I've got maybe four or five things I want to understand so I don't waste your time with a generic demo — and stop me whenever."

Permission granted in advance turns questions into a shared agenda.

2. Give before you take. After every second answer, contribute something real: "That's consistent with what I see — most teams at your size handle it that way until [threshold], then it breaks." You're trading insight for information, not extracting it.

3. Confirm back in their words. Near the end:

> "Let me make sure I've got this. The trigger was X. It's costing you roughly Y. To feel confident you'd need A and B, and A matters more. Sarah in finance weighs in and she cares about Z. And if this slips past Q4, W happens. Anything I got wrong?"

This single move does four things: proves you listened, corrects your errors while they're cheap, locks their criteria in on the record, and makes the follow-up email write itself.

What to do with bad answers

The most common discovery failure isn't asking badly — it's hearing a weak answer and proceeding anyway because you want the pipeline.

WHAT YOU HEARD	WHAT IT MEANS	WHAT TO DO
No trigger, just curiosity	No owner, no urgency	Keep it, don't forecast it
Can't quantify the cost	Problem isn't expensive enough	Ask again differently; if still nothing, deprioritize
No criteria — "just show me the product"	They're shopping, not buying	Give criteria: "Here's what teams like yours usually evaluate on"
Vague decision path	They may not have authority or interest	Ask for the next person before the next demo
"No real deadline"	Nice-to-have	Price at full, forecast at zero

Disqualifying is a skill, not a failure. Every deal you kill early returns hours to deals that can actually close, and your win rate — the lever from Module 0 — goes up because the denominator gets honest.

The one-page framework (companion asset)

Discovery Call Framework — one printable page:

```
OPEN — label the plan, get permission

1  TRIGGER      What made you take this call?
2  COST         How are you handling it today?
                What's it costing you? ($ / hrs / people)
3  CRITERIA     What would you need to see to be confident?
                Which matters most?
4  PATH         How do decisions like this get made?
                Who else weighs in? What do they care about?
5  TIMING       What's driving the timing?
                What happens if nothing changes this quarter?

CONFIRM BACK — repeat all five in their words, ask what you got wrong

CLOSE — next step with a date, a purpose, and a named person
```

Keep it visible during the call. Tick each one. If you end a call with an unticked box, you have a follow-up to make — not a proposal to send.

Common failure modes

SYMPTOM	THE ACTUAL CAUSE
Great call, then silence	You never asked question 5 — there was no consequence to inaction
Deal stalls at “legal” or “procurement”	Question 4 was skipped or answered vaguely
They push back hard on price	Question 2 never produced a number
“I need to think about it”	Question 3 was skipped, so you have no criteria to return to
Champion goes quiet or leaves	You only ever had one relationship — question 4’s follow-up wasn’t used
Discovery calls feel like interviews	You didn’t label the plan or trade insight

THE ONE THING TO TAKE FROM THIS MODULE

Objection handling is what you do when discovery failed. Keep the deck on your desk for the calls where it does — but the goal of this module is to make most of those pages unnecessary.

Every one of the five questions is the same three moves you already know: agree with their reality, ask one question, then stop talking.

NEXT

Module 5 — The Deal Review

MODULE 5

The Deal Review

Discovery fills the pipeline honestly. The deal review is how you find out which of it is real before your manager does.

The unsexy module that separates reps from professionals

Nobody posts about deal reviews. There's no clever line to screenshot. And it is the single clearest difference between a rep who hits their number three quarters running and one who has a great quarter followed by two bad ones.

Here's the mechanism. Every rep has deals that are dead but still on the board — they feel like pipeline, they get forecast, and they absorb the hours that should be going to deals that could actually close. **A bloated pipeline isn't optimism, it's a resource allocation failure.**

This module is a 20-minute weekly habit that finds them.

The 7-point checklist

Run this on every open deal, every week. Each point is yes or no. No "sort of."

#	THE QUESTION	WHY IT KILLS DEALS WHEN MISSING
1	Can I state their trigger in one sentence, in their words?	No trigger = no urgency = no close date you can trust
2	Do I have a number for what the problem costs them?	Without it, your price has nothing to sit against and discounting is inevitable
3	Do I know their decision criteria, in priority order?	You're being scored on a rubric you've never read

#	THE QUESTION	WHY IT KILLS DEALS WHEN MISSING
4	Have I spoken to more than one person?	Single-threaded deals die when one person changes job, mind, or priority
5	Do I know the actual approval path, including procurement/legal/finance?	This is where "verbal yes" deals go to spend two silent months
6	Is there a consequence to them doing nothing?	If not, it's a nice-to-have wearing a close date
7	Is there a next step on the calendar, with a date and a purpose?	"They'll get back to me" is not a next step. It's hope.

Scoring: 6–7 yes is real. 4–5 is a deal with a known gap — go fix that specific gap this week. **3 or fewer is not a deal, it's a conversation**, and it should not be in your forecast no matter how good the last call felt.

Notice that points 1–6 map exactly to Module 4's five questions. That's deliberate: the deal review is where you find out what discovery missed, while there's still time to go back and ask.

The three signals a deal is dead

Reps see all three and explain them away. Learn to read them literally.

Signal 1 — Momentum is entirely one-directional

You are the only one who follows up, schedules, sends, and reminds. Every meeting exists because you built it.

The read: deals that close have buyer-generated activity — they send you things, they loop people in, they ask about timelines. If nothing arrives unless you push it, there is no internal owner.

Signal 2 — The next step keeps softening

"Let's meet Thursday" becomes "let's touch base next week" becomes "reach back out in a few weeks." Each step is vaguer than the last.

The read: this is a polite no expressed as a scheduling pattern. Name it directly: “I might be reading this wrong — has this dropped down the priority list? Completely fine if so, I’d just rather know.”

Signal 3 — New people stop appearing

Early on you’re meeting more of the organization. Then it stops, and it’s you and one contact indefinitely.

The read: either your champion isn’t really championing internally, or they’ve been told no and haven’t told you. Ask: “When you brought this to [name], what was their reaction?” The pause before their answer tells you more than the answer.

Killing deals on purpose

Your win rate is a lever from Module 0 — and it’s a fraction. You can raise it by winning more, which is slow, or by having an honest denominator, which you can do this afternoon.

The kill script, used with yourself first:

> Would I bet my own money that this closes this quarter? If no — what’s the one thing I’d need to see to change that answer, and can I get it this week? If I can’t, it moves out or it dies.

The kill script, used with the buyer:

> “[Name], I want to be direct — I don’t think this is going to happen this quarter, and I don’t want to keep showing up in your inbox pretending otherwise. Should we close it out and revisit when [specific condition changes]?”

Two things happen when you send that. Most of the time you get a clean, useful no and reclaim your hours. Occasionally you get: “No, wait —” and the deal comes back to life, because you just created the only genuine urgency in the entire process. Either outcome is better than the silence you had.

What killing a deal is not: giving up on the account. Mark the revisit condition and date, move it to nurture in Module 1, and watch for the trigger.

The forecast call

The goal isn't to look good in the meeting. It's to never be surprised — and to never surprise your manager, which is what actually builds trust in your number.

Say this:

> "Committed: A and B — both at 6 or 7 on the checklist, next steps on the calendar. Best case: C, which is missing the approval path and I'm working on that this week. I've pulled D out — it's single-threaded and there's no consequence to inaction. I'd rather tell you now than in week 12."

Three things that language does: it gives categories with evidence, it names the specific gap on the maybe, and it pre-announces bad news. **A rep who removes their own deals before being asked gets believed about the ones they keep** — and that credibility is worth more over a year than any single deal you propped up.

> **Never:** move a deal to committed because it's the last week of the quarter and you need it to be. The math doesn't care what you need.

COMPANION ASSET · IN THE ASSET PACK

Deal Review Checklist — the 7 points on one page with yes/no boxes, one column per deal, one page per week.

Forecast Confidence Scorecard — deal, checklist score out of 7, the single biggest gap, the action to close that gap this week, and your honest own-money probability.

The weekly ritual (20 minutes, before your manager asks)

1. Score every open deal, 7 points, fast — first instinct is usually right
2. For anything at 4–5: write the one gap and the one action for this week
3. For anything at 3 or below: kill it or move the date, and say so out loud
4. Confirm every surviving deal has a calendared next step with a purpose
5. Write your forecast in the language above before the meeting, not during it

Twenty minutes. The same twenty minutes you'd otherwise spend re-reading an email thread from a deal that died in March.

Common failure modes

SYMPTOM	THE ACTUAL CAUSE
Deals slip quarter after quarter	Point 6 — no consequence to inaction, so no reason to act now
Surprise losses late in the cycle	Point 4 — single-threaded, and you only ever heard one opinion
“Verbal yes” then months of silence	Point 5 — procurement and legal were never mapped
Pipeline looks great, close rate is poor	You’re not killing anything; the denominator is fiction
You dread the forecast call	You’re forecasting hope and you know it

THE ONE THING TO TAKE FROM THIS MODULE

You will not close every deal, so the only question is how early you find out. Twenty minutes a week buys you the truth while it’s still cheap.

NEXT

Module 6 — The 90-Day Run

MODULE 6

The 90-Day Run

You now have every part of the system. This is the schedule that turns it into behavior.

Why this module exists

You now have the whole system. Statistically, that changes nothing — because knowing the system was never the constraint. Reps don't miss quota from ignorance; they miss it because their week gets eaten and the mechanics quietly stop happening.

So this module contains no new sales technique. It's a schedule, four metrics, and a small number of rules that survive a bad week.

The core idea: don't try to run all six modules at once. Sequence them, so each phase installs one habit while the previous one runs on autopilot.

The four phases

Days 1–14 — Fix the denominator

Install: the 100-account list and the weekly list ritual. **Also:** learn the opener as written. Don't improvise yet, and don't judge it yet. **Volume:** hit your Module 0 daily number, no more. Consistency is the only goal. **Metric to watch:** conversations had. Nothing else. It's the only number fully in your control.

Do not evaluate results in this phase. Two weeks is inside the noise on every metric that matters.

Days 15–45 — Run the machine at volume

Install: the full 5-touch sequence on every A and B account. This is where the real work is. **Also:** hold the opener as written for at least 20 live calls, then adapt. **Metric to watch:** conversation-to-meeting rate. This is your opener's grade.

By day 45 you should have enough calls to say something true about your script. Before that, you're reading noise and rewriting things that were working.

The trap in this phase: touch counts silently collapsing. Most reps believe they're running five touches and are actually running two. Count them — the number will surprise you.

Days 46–75 — Discovery discipline

Install: the five questions on every first call, with the framework page visible, ticking boxes. **Also:** confirm back in their words at the end of every call. Every one. **Metric to watch:** meeting-to-opportunity rate. This is discovery's grade.

Your pipeline gets *smaller* in this phase and better. That's correct and it will feel wrong. Deals you'd previously have carried for two months now get disqualified in week one, and the hours come back to you.

Days 76–90 — Deal discipline

Install: the weekly 20-minute deal review and the honest forecast language. **Also:** kill everything scoring 3 or below. All of it. **Metric to watch:** pipeline that survives the checklist, not raw pipeline.

This phase is where the earlier work converts. Deals from days 15–45 are now at the age where they close — which is exactly why the run is 90 days and not 30.

The expectation curve (read this before day 20)

DAYS	WHAT YOU'LL SEE	WHAT'S ACTUALLY HAPPENING
1–14	Nothing. Feels worse than before.	You're doing new things badly. Normal.
15–30	Some conversations, few meetings	Opener is still stiff, list is still improving
30–45	Meeting rate starts moving	The mechanics are becoming yours
45–60	Meetings up, pipeline shrinking	Discovery is disqualifying properly
60–90	Pipeline quality up, first clean closes	The day-15 work is finally maturing

Your cycle time from Module 0 governs all of this. If your average deal takes 60 days, revenue from day-15 activity lands around day 75. Judge the system on that horizon or you'll abandon something that's working at exactly the wrong moment.

Write your judgment date on the worksheet. Honor it.

The weekly 20-minute review

Same time every week. Non-negotiable, and it's the whole habit — everything else is just doing the work.

Log four numbers:

#	METRIC	SOURCE
1	Conversations had	Your count
2	Meetings booked	Calendar
3	Opportunities created	CRM
4	Pipeline that passed the 7-point checklist	Module 5 scorecard

Then answer three questions:

1. Which ratio moved, up or down? (1→2 is the opener; 2→3 is discovery)
2. What did I skip this week, and why?
3. What is the one thing I'm changing next week? *(One. Not four.)*

The diagnostic rule: two adjacent numbers tell you where the problem lives. Metric 1 healthy and 2 weak is a script or list problem. Metric 2 healthy and 3 weak is a discovery problem. Metric 3 healthy and 4 weak means you're creating opportunities that don't survive scrutiny — go back to Module 4's cost and consequence questions.

The five rules that survive a bad week

1. Protect metric 1 first. On a terrible day, hit your conversation number and let everything else slide. It's the only input fully under your control and the only one that compounds.

2. Never change two things at once. You'll learn nothing about either. One variable per week.

3. Twenty calls before you rewrite anything. Four bad calls is not data, it's a mood.

4. A skipped week is a skipped week, not a failed quarter. Reps abandon systems out of shame after one bad week. Log it in question 2, note why, resume Monday. The system doesn't care about your streak.

5. Frontload the hard block. Calls first, admin later. Every rep who moves calling to the afternoon "when things calm down" discovers things never calm down.

When you're behind (the honest triage)

Say it's day 60 and the number isn't there. Work in this order:

1. **Check your cycle time.** If your cycle is 60 days and you're on day 60, the answer is arithmetic, not effort — this quarter was decided before you started. Protect next quarter and say so in your forecast.
2. **Find which ratio is broken**, using the two-adjacent-numbers rule. Fix one.
3. **Accelerate existing deals** rather than adding new ones. New activity on day 60 lands next quarter. Only pipeline already in motion can close now.
4. **Kill the fiction.** Run the 7-point checklist and remove everything at 3 or below. You cannot manage a quarter you're lying to yourself about.
5. **Only then add volume.** More calls is the last lever, not the first — that was the whole point of Module 0.

> COMPANION ASSET · IN THE ASSET PACK
>
> **90-Day Tracker** — one sheet, 13 week-rows, four metric columns, plus a column each for "what I skipped," "the one change," and the two computed ratios. One page for the whole quarter, filled in by hand.
>
> By hand matters. The act of writing the number is what makes you look at it.

Common failure modes

SYMPTOM	THE ACTUAL CAUSE
Great week one, gone by week three	You installed all six modules at once instead of phasing them
Metrics logged but never used	You skipped the three questions — data without a decision is a diary
Constant tweaking, no learning	Changing more than one variable per week
Judged the system at day 21 and quit	Ignored cycle time
Calls keep sliding to the afternoon, then to tomorrow	You broke Rule 5 — calls are not frontloaded, and things never calm down

THE ONE THING TO TAKE FROM THIS MODULE

The rep who wins isn't running a better system than yours. They're running an ordinary system in week nine, when you've already stopped.

Ninety days, four numbers, one change a week. That's it.

IN CLOSING

That's the playbook.

You have the math, the list, the opener, the sequence, the discovery framework, the deal review, and the schedule. Nothing in here requires talent — every part of it is a repeatable mechanic, which is exactly why it works for people who were told they weren't naturals.

Run it for 90 days before you judge it. Then run it again with the one thing you learned.

COMPANION ASSETS

The Asset Pack

Eight printable tools, one page each. They ship as a separate printable PDF alongside this playbook, plus the Trackers workbook for the account list, the 90-day tracker and the quota math.

1	Quota Math Worksheet	MODULE 0
2	Cold Call Opener Card	MODULE 2
3	Voicemail Script Card	MODULE 2
4	5-Touch Sequence Map	MODULE 3
5	The 4 Cold Email Templates	MODULE 3
6	Discovery Call Framework	MODULE 4
7	Deal Review Checklist	MODULE 5
8	Forecast Confidence Scorecard	MODULE 5

> Print them. Write on them. That’s the point — the act of writing the number by hand is what makes you look at it.