B2B Revenue Execution Playbook

How to Use This Playbook

B2B selling is rarely one conversation with one decision-maker. The buyer may include an economic buyer, champion, end user, technical evaluator, security, procurement, legal, finance, and executive leadership.

Use this playbook as a framework, not a script. Adapt the depth of each lesson to deal size, complexity, risk, buying process, and the number of stakeholders involved.

House of Sales Principle

Understand the account. Understand the problem. Understand how the decision gets made. Then earn the next step.

B2B Buyer Journey

Target Account → Qualification → Discovery → Business Case → Solution Validation → Stakeholder Alignment → Proposal → Negotiation → Commitment → Paper Process → Onboarding → Value Realization → Renewal / Expansion

Lesson 1 — B2B Prospecting

Goal: Identify the right accounts, the right people, and a credible reason to start a business conversation.

Steps

1. Define the Ideal Customer Profile

Focus on industry, company size, geography, business model, operating environment, growth stage, and problems your solution can genuinely solve.

2. Identify the Buying Committee

- Economic Buyer
- Champion
- Problem Owner

- End User
- Technical Evaluator
- Security / Compliance
- Procurement
- Legal
- Executive Sponsor

3. Look for Relevant Triggers

- Hiring or restructuring
- Expansion or new locations
- Funding or acquisition
- Leadership changes
- Technology changes
- Regulatory developments
- New strategic initiatives
- Operational pressure

4. Build an Account Hypothesis

Based on what you know, form a reasonable view of what may be happening and why it could matter. Treat the hypothesis as something to test, not as a fact.

5. Select the Right Channels

- Phone
- Email
- LinkedIn
- Warm introductions
- Events or other relevant channels

Pro Tips

- Research before outreach.
- Use account context to create relevance, not to prove you researched them.
- For strategic accounts, identify more than one relevant stakeholder.
- Focus on fit and timing, not raw list size.

Common Pitfalls

- Targeting accounts only because they match a database filter.
- Assuming one title controls the entire decision.
- Using irrelevant personalization.

- Building the entire opportunity around one contact.

Exercise

Choose five target accounts. For each, identify the likely problem owner, economic buyer, champion, and one relevant trigger.

Lesson 2 — B2B Qualification

Goal: Determine whether the opportunity has enough fit, need, priority, and ability to act to deserve deeper investment.

Qualification Principle

Frameworks guide thinking. They should not turn the conversation into an interrogation.

Steps

1. Confirm Problem and Fit

- Is there a real business problem or opportunity?
- Is the problem important enough to create action?
- Is your solution genuinely appropriate?

2. Understand Priority and Timing

- Why now?
- What happens if nothing changes?
- Is there a real event, target, deadline, or business pressure?

3. Understand the Buying Committee

- Who owns the problem?
- Who approves money?
- Who can support the change internally?
- Who can block it?

4. Understand the Decision Process

- How are solutions evaluated?
- What criteria matter?
- What approvals are required?
- What happens after verbal agreement?

5. Use the Right Qualification Lens

BANT can help with simple opportunities: Budget, Authority, Need, Timeline.

For complex opportunities, use MEDDPICC: Metrics, Economic Buyer, Decision Criteria, Decision Process, Paper Process, Implicate Pain, Champion, Competition.

House of Sales Rule

No existing budget does not automatically mean there is no opportunity. A strong business case can create budget when the problem is important enough.

Pro Tips

- Qualify progressively as the opportunity develops.
- Document what is known, unknown, and assumed.
- Disqualify poor-fit opportunities early.
- Do not confuse interest with qualification.

Common Pitfalls

- Using BANT as a checklist instead of understanding the business.
- Treating one contact as the full buying committee.
- Ignoring the paper process until the end.
- Pushing weak opportunities forward because a meeting happened.

Exercise

Score three mock opportunities using fit, problem, priority, stakeholders, decision process, and ability to act. Then identify what information is still missing.

Lesson 3 — B2B Discovery

Goal: Understand the current state, desired state, gap, root cause, impact, priority, stakeholders, and decision process.

Discovery Flow

Current State → Desired State → Gap → Root Cause → Impact → Priority → Stakeholders → Decision Criteria → Decision Process

Steps

1. Understand the Current State

- How is the process handled today?
- What is working?
- Where does it break?

2. Explore the Desired State

- What would better look like?
- What business outcome matters most?

3. Diagnose the Gap and Root Cause

- What is preventing the desired outcome?
- Why is that happening?
- What has already been tried?

4. Quantify the Impact

- Revenue
- Cost
- Time
- Risk
- Capacity
- Customer impact
- Employee impact
- Strategic impact

5. Understand Priority

- Why does this matter now?
- What competes with it internally?
- What happens if the business does nothing?

6. Understand the Decision

- Who else is affected?
- Who evaluates the solution?
- What criteria will be used?
- How will the final decision be made?

7. Confirm Understanding

Summarize what you heard and let the buyer correct you.

House of Sales Principle

Diagnose before prescribing. Teach when you have a useful insight, but do not replace discovery with a lecture.

Pro Tips

- Ask fewer, better questions.
- Follow the buyer’s answers instead of reading from a checklist.
- Use silence when the buyer is thinking.

- Separate symptoms from root causes.

Common Pitfalls

- Pitching after hearing one pain point.
- Asking questions only to lead the buyer toward your solution.
- Failing to quantify impact.
- Ignoring how the decision will actually be made.

Exercise

Run a mock discovery and produce a one-page summary of current state, desired state, gap, root cause, impact, priority, stakeholders, and decision process.

Lesson 4 — B2B Business Case & Solution Mapping

Goal: Translate the diagnosed problem into a credible business case and map the solution to validated outcomes.

Steps

1. Prioritize the Business Problem

Separate the most important problem from secondary issues.

2. Define the Desired Outcome

What result would make the change worthwhile?

3. Build the Value Logic

- Current cost or impact
- Expected improvement
- Implementation effort
- Risk of change
- Risk of no change
- Time to value

4. Make Assumptions Visible

ROI, savings, productivity, or revenue estimates should clearly show what assumptions they depend on.

5. Map Solution to Outcome

Connect only the relevant capabilities to the buyer’s stated needs and desired results.

6. Define Success Criteria

Agree on how the buyer will know the solution is working.

House of Sales Rule

Do not manufacture ROI. A strong business case is credible because the assumptions are visible and the buyer can challenge them.

Pro Tips

- Use the buyer's numbers where possible.
- Keep the business case simple enough to explain internally.
- Separate verified proof from estimates.
- Align promised outcomes with delivery capability.

Common Pitfalls

- Feature mapping instead of outcome mapping.
- Unsupported financial claims.
- Using optimistic assumptions without showing them.
- Overpromising to make the deal look stronger.

Exercise

Build a simple business case using current impact, desired outcome, assumptions, expected value, and success criteria.

Lesson 5 — B2B Presentation & Demo

Goal: Prove the agreed use cases and help stakeholders evaluate whether the solution fits their environment.

Steps

1. Reconfirm the Evaluation Priorities

Start with what the buyer said matters most.

2. Demonstrate Relevant Use Cases

Show the workflows or capabilities that prove the agreed outcomes.

3. Connect Each Use Case to Business Value

Explain why the capability matters operationally, financially, or strategically.

4. Invite Stakeholder Participation

Ask technical, operational, and business stakeholders what they need to validate.

5. Address Risk and Implementation

Discuss integrations, change management, adoption, security, or migration where relevant.

6. Confirm Remaining Gaps

- What still needs to be proven?
- Who else needs to see it?
- What information is missing?

House of Sales Principle

A demo is not a product tour. It is evidence for an agreed business case.

Pro Tips

- Show less, but make each part more relevant.
- Use verified customer examples when available.
- Let technical stakeholders ask technical questions.
- Confirm next steps before the meeting ends.

Common Pitfalls

- Showing every feature.
- Running the same demo for every account.
- Ignoring implementation or adoption risk.
- Leaving without a clear evaluation outcome.

Exercise

Create a demo plan around three agreed buyer use cases, the proof needed for each, and the stakeholder responsible for validating it.

Lesson 6 — B2B Stakeholder Alignment & Decision Process

Goal: Build enough internal alignment that the opportunity can survive beyond your primary contact.

Steps

1. Map the Stakeholders

- Economic Buyer
- Champion
- Problem Owner
- End Users
- Technical Evaluator

- Security / Compliance
- Procurement
- Legal
- Executive Sponsor

2. Understand Each Stakeholder's Priorities

Different stakeholders may support the same solution for different reasons.

3. Identify the Champion

A champion has influence, access, credibility, and a personal or business reason to help the change happen.

4. Coach the Internal Conversation

Give the champion a simple business case, proof, risk answers, and next-step logic they can use internally.

5. Multithread the Opportunity

For important deals, build appropriate relationships with more than one stakeholder.

6. Use a Mutual Action Plan Where Helpful

Document agreed actions, owners, dependencies, and target dates.

House of Sales Rule

A friendly contact is not automatically a champion. A real champion helps the deal move when you are not in the room.

Pro Tips

- Ask who could block the decision, not only who supports it.
- Understand what each stakeholder must believe before saying yes.
- Keep the internal business case consistent across departments.

Common Pitfalls

- Single-threading a strategic deal.
- Confusing access with influence.
- Waiting until late stage to meet the economic buyer.
- Ignoring procurement, legal, security, or finance until they appear.

Exercise

Map a buying committee for a complex deal and write one sentence describing what each stakeholder cares about most.

Lesson 7 — B2B Proposal & Commercial Alignment

Goal: Document an already-aligned solution, scope, value, commercial structure, and path forward.

Steps

1. Confirm Alignment Before Writing

- Problem
- Desired outcome
- Scope
- Success criteria
- Stakeholders
- Commercial expectations
- Decision process

2. Recap the Business Case

Show why the change matters and what the buyer is trying to achieve.

3. Present the Solution and Scope

- Deliverables
- Responsibilities
- Implementation approach
- Timeline
- Dependencies

4. Present Commercials Clearly

- Pricing
- Payment terms
- Contract term
- Optional components
- Assumptions

5. Include Relevant Proof

- Verified case studies
- References
- Technical evidence
- Financial logic

6. Agree on the Review Process

- Who reviews it?

- When?
- What happens next?

House of Sales Principle

Do not send a proposal into a vacuum. A proposal should document alignment, not attempt to create it from scratch.

Pro Tips

- Schedule the proposal review before sending where possible.
- Keep the document easy to understand and easy to circulate internally.
- Show assumptions and exclusions clearly.

Common Pitfalls

- Sending proposals immediately after a demo without enough alignment.
- Using generic language.
- Hiding commercial complexity.
- Having no agreed next step after the proposal is sent.

Exercise

Draft a proposal outline that includes business problem, desired outcome, scope, proof, commercials, assumptions, and agreed review process.

Lesson 8 — Handling B2B Concerns & Objections

Goal: Understand the concern, reduce uncertainty where possible, and determine whether the opportunity should continue.

Objection Framework

Listen → Acknowledge → Clarify → Diagnose → Respond → Check

Steps

1. Listen

Let the buyer explain the concern fully.

2. Acknowledge

Show that you understood without automatically agreeing or becoming defensive.

3. Clarify

What does the objection actually mean?

4. Diagnose

Is the issue price, value, trust, risk, timing, internal politics, competition, implementation, or poor fit?

5. Respond

Use accurate information, relevant proof, options, or a different approach.

6. Check

Confirm whether the concern is resolved, partially resolved, or still open.

House of Sales Principle

An objection is not automatically a buying signal. Sometimes the buyer is identifying a real reason not to proceed.

Pro Tips

- Address concerns throughout the sales cycle, not only near the end.
- Use evidence instead of pressure.
- Know when to disqualify.
- Keep emotional control when challenged.

Common Pitfalls

- Using canned rebuttals.
- Treating every objection as something to defeat.
- Answering before understanding.
- Becoming defensive.

Exercise

Take five common B2B objections and respond using the six-step framework. Include one example where the correct outcome is to walk away.

Lesson 9 — B2B Negotiation

Goal: Reach a fair agreement on price, scope, risk, and terms while protecting value.

Steps

1. Prepare Your Position

- Ideal outcome
- Minimum acceptable outcome
- Non-negotiables
- Concessions available

- Approval limits
- Alternatives / BATNA

2. Understand Their Interests

Do not negotiate only around stated positions. Understand what the other side is trying to protect or achieve.

3. Trade, Don’t Concede

Exchange value rather than giving something away without a reason.

4. Negotiate the Full Package

- Price
- Scope
- Term
- Payment timing
- Implementation
- Support
- Risk allocation
- Renewal

5. Manage Procurement Professionally

Procurement is part of the process, not the enemy.

6. Document Every Change

Make sure commercial and legal documents reflect what was agreed.

House of Sales Rule

Never negotiate against yourself. Do not lower price or improve terms before the other side has asked for something and explained why it matters.

Pro Tips

- Know your alternatives before negotiating.
- Use silence and calibrated questions instead of rushing to fill pressure.
- Trade low-cost items for high-value commitments where appropriate.

Common Pitfalls

- Discounting too early.
- Making one-sided concessions.
- Negotiating only on price.
- Agreeing to terms delivery cannot support.

Exercise

Prepare a negotiation plan with your ideal outcome, walk-away point, BATNA, five possible trades, and approval limits.

Lesson 10 — B2B Commitment, Procurement & Paper Process

Goal: Convert business agreement into a completed decision, approved commercial process, and signed contract.

Steps

1. Confirm Business Commitment

Does the buyer agree the problem, value, solution, and commercial structure make sense?

2. Confirm the Paper Process

- Procurement
- Security review
- Legal review
- Vendor onboarding
- Finance approval
- Insurance requirements
- Data-processing terms
- Signature authority

3. Identify Owners and Timing

- Who owns each remaining step?
- What documents are needed?
- What can create delay?

4. Resolve Final Commercial and Legal Issues

Keep agreed business value separate from paper-process mechanics.

5. Secure Signature or Formal Acceptance

Make the signing process clear and easy.

6. Prepare the Handoff

Capture the problem, outcomes, stakeholders, scope, commitments, risks, timeline, and success criteria.

House of Sales Principle

Closing is not a trick at the end. It is the result of enough clarity, alignment, and commitment throughout the process.

Pro Tips

- Identify procurement and paper requirements early.
- Do not treat verbal agreement as a completed deal.
- Keep the champion informed as the deal moves through internal review.

Common Pitfalls

- Discovering security or legal requirements after commercial agreement.
- Assuming procurement is administrative only.
- Letting contract changes create scope confusion.
- Poor CRM and handoff notes.

Exercise

Create a paper-process checklist that starts before proposal stage and ends with signed agreement and complete handoff.

Lesson 11 — B2B Implementation, Adoption & Value Realization

Goal: Deliver what was sold, create adoption, and prove the business value the customer expected.

Steps

1. Transfer the Full Sales Context

- Original problem
- Desired outcomes
- Stakeholders
- Scope
- Commitments
- Risks
- Success criteria
- Timeline

2. Hold a Strong Kickoff

Clarify roles, responsibilities, communication, dependencies, and milestones.

3. Manage Adoption

- Training

- Enablement
- Change management
- Usage
- Internal ownership

4. Track Early Value

Measure progress against agreed success criteria.

5. Communicate Proactively

Share progress, risks, decisions, and changes before the customer has to ask.

6. Resolve Gaps Quickly

If reality differs from the sales assumption, address it early and transparently.

House of Sales Rule

A signed contract creates a customer. Value realization creates retention.

Pro Tips

- Carry discovery context into delivery.
- Set realistic early milestones.
- Celebrate meaningful wins, not vanity activity.
- Keep executive stakeholders informed at the right level.

Common Pitfalls

- A weak sales-to-delivery handoff.
- Resetting expectations during onboarding because sales overpromised.
- Focusing on implementation activity instead of customer outcomes.
- Ignoring low adoption.

Exercise

Build a 30-day onboarding plan tied to the original business case and three measurable success indicators.

Lesson 12 — B2B Retention, Renewal & Expansion

Goal: Retain the customer through value, earn renewal, and expand only where additional value is real.

Steps

1. Review Value Regularly

Use a cadence appropriate to the account, contract, complexity, and customer needs.

2. Track Adoption and Outcomes

- Are users adopting?
- Are agreed outcomes improving?
- Where is value not yet realized?

3. Maintain Stakeholder Relationships

Do not rely on one champion forever. People change roles and priorities.

4. Prepare Renewal Early

Reconfirm value, goals, commercial terms, risk, and future priorities before the contract deadline.

5. Identify Expansion After Value

- New teams
- New locations
- Additional use cases
- Additional products or services

6. Ask for Advocacy at the Right Time

- References
- Testimonials
- Case studies
- Referrals

House of Sales Principle

Expansion is earned after value. The customer should feel that growth of the account follows growth of their results.

Pro Tips

- Use account reviews to discuss business outcomes, not just activity.
- Adapt the cadence to the customer instead of using a universal monthly or quarterly rule.
- Protect relationships beyond the original buyer.
- Make renewal a value conversation, not a last-minute contract event.

Common Pitfalls

- Upselling before the customer has healthy adoption and proven value.
- Treating every client conversation as a selling opportunity.
- Waiting until renewal month to discuss renewal.
- Ignoring changes in stakeholders or business priorities.

Exercise

Design a customer growth plan that includes value review, renewal preparation, stakeholder coverage, one relevant expansion hypothesis, and an advocacy moment.

Final House of Sales Principle

Complex B2B selling becomes easier when the seller stays disciplined around a few fundamentals:

- Understand the account.
- Understand the business problem.
- Understand the impact.
- Understand the people involved.
- Understand how the decision gets made.
- Build a credible business case.
- Prove the solution against agreed outcomes.
- Reduce risk.
- Earn commitment.
- Deliver what was promised.
- Expand only after value.

The goal is not to push every opportunity forward. The goal is to help the right opportunities move forward for the right reasons.