Revenue Lifecycle Playbook

How to Use This Playbook

A sales cycle is a decision journey, not a rigid script. Deals move forward, pause, loop back, involve new stakeholders, and sometimes stop completely. Strong sellers manage the process without forcing the buyer through artificial stages.

Use this playbook to answer five questions at every point in the cycle:
- What is the buyer trying to accomplish?
- What has to happen before they can move forward?
- Who needs to be involved?
- What evidence or confidence is still missing?
- What is the clearest useful next step?

The Core Sales Cycle

Target → Qualify → Discover → Build Value → Validate Solution → Align Stakeholders → Propose → Negotiate → Commit → Onboard → Retain → Expand

House of Sales Principle

Understand before explaining. Diagnose before prescribing. Create enough value and clarity that the next step feels reasonable, not forced.

Stage 1: Prospecting & Targeting

Purpose

Create conversations with accounts and people that have a credible reason to care.

Core Actions

- Define the ideal customer profile based on fit, need, economics, geography, buying environment, and serviceability.

- Identify the right people inside the account: user, problem owner, decision-maker, economic buyer, influencer, technical evaluator, or gatekeeper.
- Research the account before outreach.
- Look for useful signals such as growth, hiring, leadership changes, expansion, technology changes, regulation, operational pressure, or a known business initiative.
- Choose the right channel based on the buyer and context: phone, email, LinkedIn, referral, event, inbound, or partner introduction.
- Lead with relevance, not a generic pitch.

B2B Lens

Right Account → Right Person → Right Reason → Right Message → Right Channel → Right Timing

B2C Lens

Right Audience → Relevant Need → Trust → Simple Offer → Low-Friction Next Step

Exit Criteria

Move forward when there is enough evidence that the person or account is worth a real business conversation.

KPIs

- Account fit rate
- Contact accuracy
- Connect rate
- Conversation rate
- Positive response rate
- Qualified next-step rate

Coaching Notes

Research should improve relevance, not become an excuse to avoid outreach. Personalization should show understanding, not prove that you found information online.

Common Pitfalls

- Targeting broad lists with weak fit
- Treating activity volume as the only measure of productivity
- Using generic messages

• Contacting the wrong stakeholder
• Inventing urgency or pretending familiarity

Stage 2: Initial Qualification

Purpose

Decide whether there is enough fit, problem relevance, and ability to act to justify deeper discovery.

Core Actions

• Confirm basic fit with the target profile.
• Understand whether a meaningful problem, goal, risk, or opportunity exists.
• Test whether the issue has enough priority to deserve attention.
• Learn how the buyer normally makes decisions.
• Understand who else may need to be involved.
• Identify obvious disqualifiers early.

Qualification Lenses

Use frameworks as thinking tools, not questionnaires.

BANT can help with Budget, Authority, Need, and Timeline.

MEDDPICC is stronger for complex B2B deals involving metrics, economic buyers, decision criteria, decision process, paper process, pain, champions, and competition.

For simpler sales, fit, need, priority, trust, affordability, and ability to act may be enough.

Exit Criteria

There is a credible problem or desired outcome, reasonable fit, a path to decision, and enough priority to continue.

KPIs

• Lead-to-qualified-opportunity rate
• Qualification speed
• Disqualification rate
• Qualified meeting rate
• Opportunity acceptance rate

Coaching Notes

Do not force premature budget or timeline answers. In some deals, budget appears only after the buyer understands the value and business case.

Common Pitfalls

- Treating BANT as a checklist
- Confusing interest with qualification
- Keeping poor-fit opportunities alive
- Disqualifying too early because budget is not yet defined
- Ignoring the real decision process

Stage 3: Discovery & Diagnosis

Purpose

Understand the buyer's current state, desired state, gap, impact, root cause, motivation, and decision environment.

Core Actions

Explore:

- Current state: What is happening today?
- Desired state: What would better look like?
- Gap: What is preventing that outcome?
- Root cause: Why is the problem happening?
- Impact: What does the gap cost in money, time, risk, effort, customer experience, or missed opportunity?
- Priority: Why solve it now, if at all?
- Stakeholders: Who experiences the issue, who owns it, and who decides?
- Previous attempts: What has already been tried?
- Decision process: What needs to happen internally before a decision can be made?

Discovery Principle

Ask only the questions that help both sides think more clearly. Bring insight when you know something useful. Discovery should feel like a business conversation, not an interrogation.

Exit Criteria

The problem, impact, desired outcome, priority, stakeholders, and decision path are clear enough to shape a relevant solution.

KPIs

- Discovery-to-opportunity conversion
- Opportunities with documented pain and impact
- Opportunities with documented decision process
- Stakeholder coverage
- Next-step conversion

> **Coaching Notes**
>
> Good discovery creates clarity. The buyer should understand their situation better at the end of the conversation than they did at the beginning.

> **Common Pitfalls**
>
> - Pitching before understanding
> - Asking questions that basic research could answer
> - Staying at surface-level pain
> - Ignoring business impact
> - Missing stakeholders

Stage 4: Business Case & Value

Purpose

Turn a problem into a reason to act.

Core Actions

- Quantify the impact where possible.
- Connect the problem to business, operational, financial, personal, or strategic consequences.
- Define what success would look like.
- Compare the cost of change with the cost of staying the same.
- Identify the value drivers that matter to the buyer.
- Build a simple case the buyer can explain internally.

> **Value Equation**

> Current State → Gap → Impact → Desired Outcome → Economic or Strategic Value

B2B Examples

Revenue, cost, risk, productivity, capacity, retention, compliance, customer experience, speed, or strategic advantage.

B2C Examples

Convenience, confidence, time saved, affordability, quality, identity, experience, safety, or personal outcome.

Exit Criteria

The buyer can explain why the issue matters and what a successful outcome is worth.

KPIs

- Opportunities with quantified impact
- Business-case acceptance
- Value-to-proposal conversion
- Economic buyer engagement where relevant

> **Coaching Notes**
>
> Do not invent ROI. Use verified data, buyer-provided assumptions, ranges, or clearly stated scenarios.

> **Common Pitfalls**
>
> - Presenting value as a list of features
> - Using unsupported savings or revenue claims
> - Building the business case without the buyer
> - Ignoring the cost and risk of implementation

Stage 5: Solution Validation

Purpose

Show that the solution can address the agreed problem in a way the buyer can believe.

Core Actions

- Map capabilities directly to agreed needs and outcomes.
- Demonstrate only what matters.
- Use relevant proof such as case studies, references, benchmarks, samples, pilots, trials, technical validation, or implementation plans.
- Address integration, adoption, operational, security, clinical, compliance, or service concerns where relevant.
- Confirm what the solution does not do.
- Test whether the buyer sees a credible fit.

Demo Principle

A demo is proof of fit, not a product tour.

Exit Criteria

The buyer believes the solution can realistically produce the desired outcome and the major fit concerns are understood.

KPIs

- Demo-to-next-step conversion
- Trial or pilot conversion
- Technical validation completion
- Proof-of-concept success
- Stakeholder confidence

Coaching Notes

Show less, but make it more relevant. The right five minutes can be more persuasive than a forty-minute feature tour.

Common Pitfalls

- Feature dumping
- Showing capabilities unrelated to discovery
- Using generic case studies
- Avoiding limitations
- Leaving implementation questions until late

Stage 6: Stakeholder & Decision Alignment

Purpose

Build enough internal agreement for the opportunity to move forward.

Core Actions

- Map users, champions, economic buyers, executives, technical evaluators, procurement, legal, finance, and other influencers.
- Understand what each stakeholder cares about.
- Identify who supports the change, who is neutral, and who could block it.
- Help the champion communicate the business case internally.
- Clarify decision criteria and decision process.
- Agree a realistic mutual action plan for complex deals.

Stakeholder Principle

Do not sell to job titles. Sell to priorities, responsibilities, risk, and context.

Exit Criteria

The important stakeholders are known, decision criteria are clear, and there is a realistic path to approval.

KPIs

- Stakeholder coverage
- Economic buyer access
- Champion strength
- Decision-process clarity
- Multi-threaded opportunity rate

Coaching Notes

One enthusiastic contact is not the same as organizational commitment.

Common Pitfalls

- Single-threading complex deals
- Treating procurement or legal as enemies
- Assuming the user owns the budget

- Failing to coach the internal champion
- Discovering a blocker after the proposal

Stage 7: Proposal & Mutual Action Plan

Purpose

Document the agreed problem, solution, value, scope, commercial terms, and next steps.

Core Actions

A strong proposal should make five things easy to understand:

- What problem are we solving?
- What outcome are we working toward?
- What exactly is included?
- What does it cost and what are the commercial terms?
- What happens next?

For complex B2B opportunities, include or align to a mutual action plan with owners, dates, reviews, procurement steps, legal steps, implementation planning, and target decision timing.

> **Proposal Principle**
>
> Never send a proposal into a vacuum. Agree who will review it, how it will be evaluated, and when you will discuss it together.

Exit Criteria

The buyer understands the scope, value, investment, terms, and decision steps, with a specific next action agreed.

KPIs

- Proposal-to-decision rate
- Proposal-to-win rate
- Time from discovery to proposal
- Proposal aging
- Next-step adherence

> **Coaching Notes**
>
> A proposal should confirm alignment, not create it for the first time.

Common Pitfalls

- Generic proposals
- Sending price before value is established
- No scheduled review
- Unclear scope
- Too many options without guidance

Stage 8: Negotiation, Procurement & Paper Process

Purpose

Reach a workable agreement without destroying value or creating avoidable friction.

Core Actions

- Know your walk-away point and best alternative.
- Understand the buyer's interests behind their requests.
- Separate price from terms, scope, timing, payment structure, volume, commitment, and risk.
- Trade rather than concede.
- In B2B, anticipate procurement, security, legal, vendor onboarding, insurance, and contracting requirements.
- Keep the commercial sponsor involved when procurement enters.

Negotiation Principle

Do not negotiate against yourself. If you give something, understand what you receive in return.

Exit Criteria

Commercial terms are agreed, paper-process requirements are understood, and no unresolved issue is likely to prevent commitment.

KPIs

- Discount rate
- Gross margin
- Negotiation cycle time
- Contract redline cycle
- Procurement completion rate

• Win rate after proposal

Coaching Notes

Empathy is not weakness. Confidence is not aggression. The best negotiation protects the relationship and the economics.

Common Pitfalls

• Discounting before understanding the objection
• Making unilateral concessions
• Surprising the buyer with terms late
• Losing the business sponsor during procurement
• Treating every request as a price objection

Stage 9: Commitment & Contract

Purpose

Convert alignment into a clear, documented commitment.

Core Actions

• Confirm the final decision.
• Complete signatures, payment, purchase order, enrollment, or required approval.
• Reconfirm scope, responsibilities, dates, and expectations.
• Confirm who owns the handoff.
• Schedule the first onboarding or delivery milestone before momentum disappears.

Closing Principle

Closing is not a trick. It is the point where both sides agree the decision makes sense and commit to the next phase.

Natural Commitment Questions

• “Based on what we have covered, does moving forward make sense?”
• “What is still unresolved before we finalize this?”
• “Who else needs to sign off?”
• “Can we agree the next step while everyone is aligned?”

Exit Criteria

The commercial commitment is complete and the customer knows exactly what happens next.

KPIs

- Win rate
- Time to signature
- Contract completion accuracy
- Payment or purchase-order completion
- Sales-to-delivery handoff quality

Coaching Notes

Assumptive closing only works when the buyer has already indicated intent and the choices are genuinely available.

Common Pitfalls

- Creating pressure at the final moment
- Assuming verbal interest equals commitment
- Leaving handoff details unclear
- Letting signed deals sit without onboarding
- Celebrating the contract while ignoring customer expectations

Stage 10: Onboarding & Adoption

Purpose

Turn the promise sold into an experience the customer can trust.

Core Actions

- Transfer the business context, goals, scope, stakeholders, commitments, and success criteria to the delivery team.
- Confirm implementation responsibilities.
- Set communication rhythm and escalation paths.
- Deliver early wins where practical.
- Train users or customers appropriately.
- Track adoption, usage, quality, delivery, or satisfaction depending on the product.

Handoff Standard

The delivery team should know:

Problem → Desired Outcome → Why the Customer Bought → Scope → Stakeholders → Risks → Commitments → Success Criteria → Next Milestone

Exit Criteria

The customer is live, using the product or service as intended, and knows where to go for support.

KPIs

- Time to value
- Implementation completion
- Adoption or usage
- Early customer satisfaction
- Issue resolution
- Handoff accuracy

Coaching Notes

The sale is not complete when the contract is signed. It is complete when the customer experiences the value they expected.

Common Pitfalls

- Poor sales-to-delivery handoff
- Overselling during the sales process
- Weak onboarding communication
- Ignoring adoption
- Failing to manage early problems quickly

Stage 11: Retention & Account Management

Purpose

Protect the relationship by making sure value continues after the initial sale.

Core Actions

- Review outcomes against original goals.
- Keep communication useful and appropriate to the account.
- Resolve issues before they become renewal problems.

- Share relevant insights, updates, and performance information.
- Track stakeholder changes.
- Identify new needs only after value and trust are established.
- Ask for feedback and advocacy when it is earned.

Account Principle

Do not treat every customer as an upsell opportunity. Treat every customer as a value-delivery responsibility.

Exit Criteria

The relationship is healthy, value is visible, risk is understood, and future priorities are known.

KPIs

- Retention
- Product or service adoption
- Customer satisfaction
- Health score where applicable
- Issue resolution
- Reference or referral readiness

Coaching Notes

Existing customers should not receive less attention simply because the contract is already signed.

Common Pitfalls

- Disappearing after the sale
- Contacting customers only when renewal is near
- Pushing expansion before value is proven
- Ignoring stakeholder turnover
- Measuring activity instead of account health

Stage 12: Renewal & Expansion

Purpose

Continue the relationship when value is clear and expand only where a real need exists.

Core Actions

- Start renewal conversations early enough to solve issues.
- Review original goals and achieved outcomes.
- Confirm what has changed in the customer's business.
- Rebuild the business case for continuation.
- Identify relevant expansion opportunities across teams, locations, products, services, or use cases.
- Reconfirm stakeholders and buying process because they may have changed.

> **Expansion Principle**
> Expansion is a new sale inside an existing relationship. Diagnose before proposing.

Exit Criteria

The customer renews, expands, or makes a clear decision with expectations and next steps documented.

KPIs

- Renewal rate
- Net revenue retention where applicable
- Expansion revenue
- Churn
- Contraction
- Renewal cycle length
- Multi-product or multi-location adoption

> **Coaching Notes**
> Renewal should not be a surprise conversation. Strong account management makes renewal the continuation of an ongoing value discussion.

> **Common Pitfalls**
> - Waiting until the final weeks
> - Assuming satisfaction without evidence
> - Using discounts to hide weak value
> - Expanding into areas that do not fit
> - Failing to understand why customers churn

How the Cycle Really Works

The stages are connected, but they are not perfectly linear.

A new stakeholder may send you back to discovery.
A security review may create a new objection.
A proposal may expose a missing business case.
A negotiation may reveal that the economic buyer was never involved.
A successful onboarding may uncover the next expansion opportunity.

The seller's job is not to force movement. The job is to understand what is missing, solve the right problem, and earn the next commitment.

Final Operating Standard

At every stage, be able to answer:

- Why this account or customer?
- Why this problem?
- Why now?
- Why this solution?
- Who needs to believe it?
- What risk remains?
- What is the next useful step?

If you cannot answer those questions, the deal is probably less advanced than the CRM stage suggests.