Prospecting sprint

Turn an account list into a clear reason to start a conversation.

Choose five fitting accounts. Record a current trigger for each; treat the problem as a hypothesis. Schedule outreach and follow-up.

COMPLETED EXAMPLE - FICTIONAL

Account: Northlight Cloud, 180 employees. Trigger: five open CS roles (careers page, 14 Sep). Hypothesis: handoffs require more effort. Persona: Head of CS. Next step: partner introduction on 22 Sep; ask about handoff time.

Week / owner	ICP / segment / goal

1 Prioritize five accounts

Account + specific ICP fit	Observed trigger + source / date	Persona + problem hypothesis	Priority + next step

Focus account and reason

Prospecting sprint

Continue the worksheet. Separate facts, assumptions and commitments.

Focus account / contact	Channel / checked on

2 One message with one next step

Observation: Which verified trigger makes the message relevant?

Hypothesis + value: Which question and relevant example?

Invitation: What is the small, specific next action?

3 Execute and learn

Action / channel	Date + owner	Response / next decision

What did you learn? What will change in the next sprint?

COMPLETION CHECK

- [ ] ICP fit is supported by a specific reason.
- [ ] The trigger is observed and current.
- [ ] The target role matches the problem.
- [ ] The message offers value and a clear next step.
- [ ] The contact channel has been checked and time for outreach is scheduled.

Stakeholder map

Identify influence, decision authority, and relationship gaps.

Buying roles are not job titles. Record who decides, funds, evaluates and uses. Mark unconfirmed roles as assumptions.

COMPLETED EXAMPLE - FICTIONAL

Account: Lindenworks. Mara, Head of HR: functional advocate, champion status unverified. Leon, CFO: budget approval per Mara, no direct access. Ivo, IT: integration reviewer confirmed. Action: Mara invites Leon to the value review on 6 Oct.

Account / initiative	As of / prepared by

1 People and influence

Name / job title	Buying role + interest	Influence / stance / access	Evidence or assumption

Missing roles: budget, decision, users, technical, procurement / legal

Stakeholder map

Continue the worksheet. Separate facts, assumptions and commitments.

2 Make relationships visible

Sketch or text: Who influences whom? Solid = confirmed; dashed = assumption.

3 Close access gaps

Relationship gap / question	Action / introduction via	Owner + due date

Largest gap / next joint conversation

Review date / with

COMPLETION CHECK

- ☐ The champion and budget owner have been verified separately.
- ☐ Users and technical stakeholders are included.
- ☐ Influence and relationship strength are described.
- ☐ Assumptions are clearly flagged.
- ☐ A concrete action addresses the largest access gap.

Discovery brief

Turn meeting notes into a shared understanding.

Use this sheet during the conversation. Listen for specific workflows and evidence. Play back your understanding before proposing a solution.

COMPLETED EXAMPLE - FICTIONAL

Lindenworks, Head of CS: 8 of 20 handoffs lack information. Rework time: not yet measured. Trigger: ten hires in November. Agreed: Mara shares three handoffs by 24 Sep; together we measure rework and decide whether a trial is useful.

Account / meeting date	Attendees / roles

1 Situation and problem

Decision this meeting should support + problem in the customer's words

Current process / affected teams / specific example / previous attempts

2 Connect impact to evidence

Metric / impact	Baseline + source / period	Target or open measurement question

Discovery brief

Continue the worksheet. Separate facts, assumptions and commitments.

Why now? Customer trigger / date / consequence of waiting

Who decides, holds budget and must be involved? What is confirmed?

Decision criteria / alternatives / keeping the status quo

Playback: Here is how I understand the problem, impact and goal ...

Customer correction / confirmation

Next step / owner / due date / confirmation

COMPLETION CHECK

- [ ] The customer's problem has been restated and confirmed.
- [ ] Business impact is supported by evidence or flagged as an open question.
- [ ] The customer has explained why now.
- [ ] Stakeholders and the decision process have been discussed.
- [ ] The next step has an owner and a date.

Trial plan

Define success, the process, and the decision before the first login.

A trial answers a decision question. Agree on a few measurable criteria and a final review before the trial starts.

COMPLETED EXAMPLE - FICTIONAL

Lindenworks Reporting, 5-16 Oct. Criterion: create the monthly report from the same data in no more than 4 hours versus 8, measured by Finance. Also: two sources connected, 20 spot checks correct. Review 19 Oct with Finance and budget owner; figures are fictional.

Account / trial owners on both sides	Start / end / review

Decision question / business case / explicitly out of scope

1 Agreed success criteria

Criterion / metric	Baseline > target	Method / data / owner	Confirmed by / date

Trial plan

Continue the worksheet. Separate facts, assumptions and commitments.

2 Readiness and resources

Data / access / task	Owner + due date	Dependency / status

Check-in(s): dates + participants

Final review: date + decision-maker

Decision rule: What follows success, partial success or stopping?

Result for each criterion + evidence / remaining gap

Joint decision / next step / owner / date

COMPLETION CHECK

- ☐ Both sides understand the business case.
- ☐ Success criteria and measurement methods are agreed.
- ☐ Resources and owners are available.
- ☐ Check-ins and the final review are scheduled.
- ☐ The decision to make after the trial is clear.

Mutual action plan

Guide both teams through the steps to project kickoff.

Work backward from the customer outcome. Dates need confirmation. Completed steps need visible evidence.

COMPLETED EXAMPLE - FICTIONAL

Goal: simplify reporting before the November close. 7 Oct: Finance confirms trial measurements. 9 Oct: IT confirms integration. 14 Oct: Legal resolves open clauses. 16 Oct: CFO decides budget. All illustrative dates confirmed; schedule kickoff after approval.

Account / joint plan owners	As of / next review

Customer goal / metric / desired start and business reason

1 Milestones to the customer outcome

Milestone + evidence of completion	Owner / side	Date / confirmed?	Dependency / status

Mutual action plan

Continue the worksheet. Separate facts, assumptions and commitments.

2 Check the full buying process

Budget / procurement / legal / security / signing: Who reviews what by when?

3 Resolve risks together early

Risk / open assumption	Mitigation + owner	Due / impact on plan

Delay: What changes for the decision or customer outcome?

Customer / vendor confirmation / date

Next review / plan location

COMPLETION CHECK

- [ ] The customer contributes to the plan.
- [ ] The goal and metrics are documented.
- [ ] The buying process and relevant reviews are known.
- [ ] Each milestone has an owner and a confirmed date.
- [ ] Project kickoff and regular reviews have been discussed.

Give/get preparation

Prepare each concession as a deliberate agreement.

Understand the interest behind the request first. Prepare specific, mutual commitments. Confirm internal approval limits before the conversation.

COMPLETED EXAMPLE - FICTIONAL

Customer interest: a reliable rollout. Give: two additional admin training sessions. Get: named admin team, committed attendance and agreed rollout date. Internal approval: pending, Sales Lead reviews by 25 Sep. No commitment to the customer yet.

Account / negotiation date / participants

Customer request / underlying interest / how confirmed?

Goal / minimum conditions / approved flexibility / approved by

1 Prepare exchange options

Give: scope + internal effort	Get: specific commitment in return	Condition + approval status

Give/get preparation

Continue the worksheet. Separate facts, assumptions and commitments.

Additional option / alternative if no agreement is reached

2 Draft a conditional offer

If you commit to ... , we can offer ... under these conditions:

Who can commit on each side? Which approval is still outstanding?

3 Record the outcome

Agreed give / get / scope	Condition / valid until	Confirmed by / date

Next action / owner / due date / update to the shared plan

COMPLETION CHECK

- [ ] The interest behind the request is understood.
- [ ] The give is within confirmed approval limits.
- [ ] The get is specific and the customer can commit to it.
- [ ] Conditions are documented transparently.
- [ ] The next step and owners are agreed.