



Understanding the Buyer's Context

LEARNING OVERVIEW - Understanding the Buyer's Context

In the explore phase of your inbound sales strategy, you need to create an exploratory conversation so that you're in control but your prospect feels like they're being empowered to make the right decisions. This lesson shows you how to use the CGP, TCI, BA framework to structure your conversations and guide your prospects toward the best possible outcome.

User will be able to plan and execute a one-on-one call or meeting to uncover a prospect's goals and challenges.

- User will be able to explain the importance of having an exploratory conversation with each prospect.
- User will be able to explain the CGP framework.
- User will be able to start an exploratory conversation with individual prospects.
- User will be able to diagnose the prospect's needs.
- User will be able to encourage the prospect to take action.
- Other: [Blog post: The Ultimate Guide to Active Listening: How to Earn People's Trust Using Your Ears](#)
- Other: [Blog post: A 10-Minute Exercise to Increase Happiness, Build Rapport, and Strengthen Relationships](#)
- Other: [Blog post: The Ultimate Guide to Sales Qualification](#)
- Other: [Blog post: BANT Isn't Enough Anymore: A New Framework for Qualifying Prospects](#)
- Other: [Prospect Management Tool: Engage with the right information at the right time](#)
- Download: [Printable Resource: The CGP, TCI, BA Framework](#)
- Website: [Learn on the go. Subscribe to HubSpot on YouTube!](#)

VIDEO - Why Do You Need a Qualification Framework?

The Exploratory Phase is the most important part of any good sales strategy.

It's the part where you truly learn how you can best help your prospects, whether they need your help, and whether they want it. It's how you can open your prospects' eyes to a better world – when they'll start to believe that you can help them overcome their challenges and achieve their goals – all within the right timeline and the right budget.

SLIDE The Explore Phase is the third part of your inbound sales strategy.

An inbound salesperson explores the challenges and goals of qualified leads.

You determine if your solution is the best fit for their context. If it is a good fit, you convert these leads into opportunities. To do this, you need a qualification framework to work within.

SLIDE You've probably heard of qualification techniques like BANT.

While these can be effective for identifying ready-to-buy prospects, they aren't that effective in helping prospects understand the value of a differentiated offering.

BANT

B Budget

A Authority

N Needs

T Timeline

Qualification techniques aren't helpful for convincing a prospect to change a provider.

These tactics also can't help prospects who just don't know they have a challenge yet. A much better approach is a process called CGP, TCI & BA. This acronym helps you define the challenges and goals, set a timeline, and determine the impact to a prospect.



SLIDE Here is a table of definitions for CGP, TCI, BA

CGP, TCI, BA

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"What goal is your challenge preventing you from achieving?"

P The prospect's PLAN for overcoming their challenge

"How do you plan to overcome your challenge?"

T The prospect's TIMELINE for achieving their goal

"When do you need to achieve this goal?"

C The negative CONSEQUENCES of failure

"What happens if you don't achieve this goal?"

I The positive IMPLICATIONS of success

"After you achieve your goal, what will you do next?"

B The prospect's BUDGET

"What do you plan to invest to achieve this goal?"

A The AUTHORITY required to move forward with your solution

"Who needs to be involved in this decision?"

SLIDE CGP stands for Challenges, Goals, and Plans.

You need a deep understanding of your prospect's challenges, goals, and plans before you can even begin to suggest a path forward.

SLIDE TCI stands for Timeline, Consequences, and Implications.

If you can help your prospect to define a timeline for implementing their plans, and if you can get them to articulate the negative consequences of inaction as well as the positive implications of taking action, you'll help them find the motivation to act within that timeline.

SLIDE BA stands for Budget and Authority.

There's just no getting around the need for your prospect to have the budget and authority to enact whatever solution you're suggesting. But instead of leading with that, save it for the end. Help your prospect understand the vision and what's at stake before you start talking logistics.

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Print it out and hang it by your desk.

Keep it at the front of your mind in all of your exploratory calls. When discussed in the correct order, CGP, TCI, and then BA, a salesperson can understand someone's entire context, regardless of whether they were looking for something or not. Exploring new business opportunities requires you to absorb a lot of information. Having a framework helps you in several ways.

SLIDE You need a framework that is helpful to the prospect.

Your framework should be:

1. Understanding: You can make sure you don't miss the details that are important in understanding your buyer's context.
2. Effective communication: You can have a structure for communicating your prospect's story



back to them, helping them know that you heard them.

3. Advising: You can position your products and services as a solution to your buyer's challenges.

SLIDE An inbound salesperson delivers customized sales presentations.

To tailor your content, you need to use your time in the Explore Phase to discover and fully understand the buyer's context.

VIDEO - Starting an Exploratory Call

How you start an exploratory call can impact the rest of the call.

You need to set yourself up for success right from the start.

SLIDE Start the call by doing three things:

- Building rapport
- Recapping what you learned in previous conversations
- Set an agenda for the call

SLIDE Rapport building should start before you get on the call.

Spend some time researching your contact on LinkedIn and reviewing their history in your CRM.

Little details can impact your call success.

You should notice things like how they're dressed in their profile picture. This can help you understand the tone you should use on the call itself. A 50-year-old man in a tie will behave differently than a millennial in a T-shirt and will quite naturally respond differently to the questions you ask.

SLIDE Ask some open-ended questions to get the conversation started.

For example, ask them about their business. People love to talk anything that's happening in their business.

Can you reference a recent piece of company news?

Research and see if there is a relevant industry trend and ask a question about it. Most people will open up and share what they think about it. This is partially rapport building, but it's also a good way to learn more about the prospect's context so you can make sure you're being relevant.

SLIDE Rapport building is important.

Keep this part of the call from going on too long and don't try to appear over-eager.

Listen carefully to your prospect for a signal of too much rapport building.

You hear the point where your prospect is thinking, "Enough chit-chat – let's talk business now." Once you hit that point, move on to the next part of the call: Recapping what you learned and shared during previous conversations.

SLIDE In your initial call, set some expectations and secure buy-in.

You are then prepared for how this call would go.



How do you get your follow-up call off to a good start?

The easiest thing to do is pick up where you left off with something like, "The other day, when we spoke, you shared a few challenges that you're frustrated with. You mentioned that it was preventing you from achieving some important company goals. Can you expand a bit more on what you're dealing with?" Many prospects will repeat what you discussed and expand on their challenges, giving you a bunch of details.

SLIDE Get your prospect to open up right away.

Then you should ask some follow up questions and repeat some of these issues, so that they know you're listening effectively.

If the prospect talks first, you can then focus on what they are telling you.

You can ensure your agenda will be focused on the challenges they've acknowledged. When setting your agenda, use what you discovered about the prospect from your research, your initial conversation, and anything they just shared with you during the beginning of the conversation.

SLIDE Setting an agenda step 1

Here's an example of how that conversation could go:

Seller: "We can definitely cover that today. Before we get too far into that topic, though, I suggest we set an agenda. I know we booked 60 minutes today. Does that still work?"

Prospect: "Yes."

SLIDE Setting an agenda step 2

Seller: "Typically, a good goal for this call is to really figure out how I can best help you. I've worked with many companies like yours who were struggling with the challenge you've acknowledged. I can certainly share some advice based on my previous work with them. But, I find that everyone is a bit different. So, it usually makes sense for me to understand more context about your goals, other challenges you've faced or anticipate facing, any plans you have in place, as well as timelines and other constraints you might have. Are you comfortable having that conversation today?"

Prospect: "Yes. That sounds refreshing, actually, compared to most salespeople who just want to talk at me about how awesome they are."

SLIDE Setting an agenda step 3

Seller: "Great. I suggest we treat this conversation like a two-way dialog. I have a bunch of questions for you. I'm sure you'll have some questions that I will certainly answer for you. Then, at the end of the call we can decide whether it makes sense for us to continue discussing how we can more formally help you. Does that sound like a good plan to you?"

Prospect: "Yes."

SLIDE Setting an agenda step 4

Seller: "Great. Can you start by sharing your goals for taking this call?"

If you've done your research, your connect call will go well.

Your prospect will say yes and you'll be off and running.

To recap, you need to start your call with the right amount of rapport building, and then you want to move on to recapping previous conversations and setting the agenda for the rest of the call. Doing these things will set the right tone for the call and ensure you and your prospect are aligned on where you want to go together. And then you'll be in a great position to get down to the business of exploring your prospect's needs.

VIDEO - Exploring a Prospect's Goals and Challenges



You've set the tone and agenda for your exploratory sales call.

Now use the CGP, TCI & BA framework to guide you through the rest of your call. Remember, that stands for challenges, goals, and plans; timeline, consequences, and implications; and budget and authority. It's a lot to remember – that's why it's a great idea to have the framework printed out and hung somewhere near your desk. In this video, we'll talk about just the first part of it.

SLIDE Here is the CGP, TCI & BA framework.

Table 1. CGP, TCI, BA

C The CHALLENGE your prospect is trying to overcome	<i>"Do you ever struggle with X?"</i>
G The GOAL your prospect is trying to achieve	<i>"What goal is your challenge preventing you from achieving?"</i>
P The prospect's PLAN for overcoming their challenge	<i>"How do you plan to overcome your challenge?"</i>
T The prospect's TIMELINE for achieving their goal	<i>"When do you need to achieve this goal?"</i>
C The negative CONSEQUENCES of failure	<i>"What happens if you don't achieve this goal?"</i>
I The positive IMPLICATIONS of success	<i>"After you achieve your goal, what will you do next?"</i>
B The prospect's BUDGET	<i>"What do you plan to invest to achieve this goal?"</i>
A The AUTHORITY required to move forward with your solution	<i>"Who needs to be involved in this decision?"</i>

SLIDE Challenge Goal Plan

CGP

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SLIDE People make a change only when a challenge impedes their progress.

Sales people look for their customers' pain points.

If you are in sales, you've heard phrases like "find the problem" or "identify the pain points." Most prospects won't respond well to, "Tell me about your pain points" or, "Share all of your problems with me," but will share their challenges.

SLIDE How can you get people to share their challenges?

A small, but powerful wording adjustment can make all the difference.

It's best to find multiple challenges for every prospect.

It helps to make a list of all of the challenges you solve most frequently for each of the personas, industries, or roles you sell to, so that you can prompt your prospects. Let's review some examples of how you can bring these types of challenges proactively.

SLIDE Exploring challenges step 1:

"Many times, when I'm speaking with a VP of Recruiting like yourself in the tech industry, they have one of a handful of challenges. It's often x, but a lot of times it's y or z, too. Do you ever struggle with any of these things?"

SLIDE Exploring challenges step 2:

"When I hear someone say they have x issue, that often means they are frustrated with y. How about you?"

SLIDE It's critical to employ active listening when you probe for challenges.

Active listening makes your prospect feels heard and understood.



SLIDE Active listening is a four-step process:

1. Truly listen to the prospect.
2. Repeat the content and the feeling of the prospect's words.
3. Confirm you heard the prospect correctly.
4. And ask a relevant follow-up question to further clarify your understanding of their situation.

SLIDE Once you understand their challenge, determine the prospect's goal.

CGP

C The CHALLENGE your prospect is trying to overcome "Do you ever struggle with X?"

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SLIDE Transition from talking about challenges and focus on the goals.

Most people love talking about their goals.

How do you start discussing your prospect's goals?

Run through a few test scenarios to get a process in place. Here are some examples of how you might transition from challenges to goals.

SLIDE Exploring goals step 1:

"You've shared with me that x, y, and z challenges are most important. What goals are they preventing you from achieving?"

SLIDE Exploring goals step 2

"If you fast forward one year from now and look back, which one or two goals will you have hoped you've accomplished?"

SLIDE You can also share goals that your other prospects achieved.

Exploring goals step 3:

"I was speaking with a tech company like yours the other day and they mentioned that their goal was to achieve x. Do you have a goal that's similar to that?"

SLIDE Which challenges are preventing them from achieving which goal?

Exploring goals step 4:

"I'm wondering how much you think challenge A is preventing you from achieving goal Z?"

Talk about the goals you can help them achieve.

Explain which challenges you can help them overcome so that you can get them thinking about the quantifiable business value you can provide. All B2B products and services usually help a company do one of three things: make more money, save money, or avoid risk. If you don't talk about goals and challenges, you won't express your value in that way, and they may not directly tell you these things out of the gate. But, you need to understand which of these three things your product helps them do, so that you can get them to acknowledge it. If you're in B2C sales, your value proposition might vary more than that, but you still need a deep understanding of what it is.

SLIDE Ensure you understand their goal.

Once the prospect has shared an important goal, quantify it.



How do you quantify a goal?

For example, if you're a recruiting agency that helps companies hire salespeople, you might ask, "How many salespeople do you need and how many do you think you can hire if you do nothing differently?" or "If you lower the bar and hire more B or C players, how much underperformance would you expect?"

SLIDE You need to understand the financial impact.

You'll be more prepared for budget planning for your prospect. Your solution should help your prospect avoid financial downsides.

SLIDE The next step in CGP is planning.

CGP

C The CHALLENGE your prospect is trying to overcome "Do you ever struggle with X?"

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SLIDE Wait before you start suggesting solutions to their challenges.

It's important to know how they have done things in the past and how they're already thinking of doing things now.

SLIDE Exploring plans step 1:

"How have you tried to overcome challenge x? Why didn't it work? How do you plan to overcome challenge x in the future?"

You want your prospect to acknowledge they don't have a good solution.

They may be afraid they won't achieve some of their goals as a result. They are then more receptive to your help.

SLIDE Exploring plans step 2:

"Are you 100% confident that implementing this plan will help you achieve your goals?"

SLIDE Are they open to new ways of approaching their situation?

Exploring plans step 3:

"Sounds like you have some doubt. Would you be open to new ways of solving your challenges?"

Your goal is to help your buyers be ready to take action.

Discuss their challenges, goals, and plans – in that order specifically. Once you have this information, you'll be well positioned to encourage them to take action.

VIDEO - Motivating a Prospect to Take Action

How do you motivate a prospect to take action?

At this point, you now understand your prospect's challenges, goals, and plans. Hopefully, you've found something that they want to do that they don't think they can do on their own. At this point in the call, you should be ready to introduce the things you do that can help them with their goals and challenges. Ideally, these are things that you're uniquely positioned to help them with – things your competition can't do. If so, you're now in a great position to share some ways you can alleviate their concerns. This brings us to the TCI part of the CGP, TCI & BA framework you can use to understand a prospect's entire context on an exploratory call.



SLIDE CGP, TCI & BA

Stands for Challenges, Goals, and Plans; Timeline, Consequences, and Implications; and Budget and Authority.

SLIDE TCI stands for Timeline, Consequences, and Implications.

TCI

T The prospect's TIMELINE for achieving their goal "When do you need to achieve this goal?"

C The negative CONSEQUENCES of failure "What happens if you don't achieve this goal?"

I The positive IMPLICATIONS of success "After you achieve your goal, what will you do next?"

During the TCI part of the conversation, focus on the impact of decisions.

You want to cover three things: The prospect's timeline and urgency, the negative consequences of inaction, and the positive implications of taking action.

SLIDE Suggesting other possibilities step 1:

Here are some ways you can start this conversation:

"Would you be open to hearing another way to approach solving challenge x?"

SLIDE Suggesting other possibilities step 2:

"Have you thought about trying to do y in order to achieve goal z?"

SLIDE Suggesting other possibilities step 3:

"Would it help if I showed you how other companies implemented x in order to eliminate challenge y?"

SLIDE Suggesting other possibilities step 4:

"Most companies who struggle with challenges, find that solution x eliminates 95% of the problem. Do you think that would be an improvement for you?"

SLIDE Ask the prospect if they believe your suggestions will help them.

Confirm that they are interested in implementing several of your solutions. If they aren't, then figure out why!

SLIDE This brings us to the T in TCI: timeline.

Table 2. TCI

TCI

T The prospect's TIMELINE for achieving their goal "When do you need to achieve this goal?"

C The negative CONSEQUENCES of failure "What happens if you don't achieve this goal?"

I The positive IMPLICATIONS of success "After you achieve your goal, what will you do next?"

SLIDE Many companies or individuals have goals that are time-bound.

Now that you've started to reshape your prospect's plan, it's critical to understand their timeline and urgency.

SLIDE How can you find out their timeline?

Exploring timelines step 1:

"When do you need to achieve this goal?"

SLIDE Exploring timelines step 2:

"How long are you prepared to deal with this challenge?"



SLIDE Now you're in a position to define the steps in the plan.

You'll need to determine if your plan should include an implementation stage.

If you're selling something that requires an implementation period or just takes time and effort to see results, you should communicate the steps that occur after they sign the dotted line.

SLIDE The next step in TCI is C for consequences.

TCI

T The prospect's TIMELINE for achieving their goal "When do you need to achieve this goal?"

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I The positive IMPLICATIONS of success *"After you achieve your goal, what will you do next?"*

Timeline conversations transition easily into conversations about consequences.

As a prospect talks through their timeline and plan, you should begin to understand how eager they are to change.

SLIDE Are they're heavily engaged in planning?

This means they're usually pretty serious about change and trying something different.

SLIDE Don't confuse challenges with consequences.

Consequences are the bad things that result from inaction or making the wrong decision to a challenge.

Let's look at an example of consequences vs. challenges.

You might have trouble finding time to take your car in for an oil change. That's a challenge. If you never get around to changing the oil, the engine might seize up, and you'll be out of a car. That's a consequence.

Get your prospect to verbalize the consequences of sticking with the status quo.

SLIDE Exploring consequences step 1:

"If you don't achieve this goal, what happens to the company? What happens to you? Who else will be affected?"

SLIDE Exploring consequences step 2:

"How important is overcoming this challenge to your company?"

SLIDE The final part of TCI is I for implications.

TCI

T The prospect's TIMELINE for achieving their goal "When do you need to achieve this goal?"

C The negative CONSEQUENCES of failure *"What happens if you don't achieve this goal?"*

I The positive IMPLICATIONS of success *"After you achieve your goal, what will you do next?"*

SLIDE Focus on the positive implications of making a change.

SLIDE Clearly define the implications.

Implications are often implied within goals.

Let's look at an example of implications.

For example, someone might receive a promotion if they achieve a goal. A company will grow if they hit their



revenue targets. But, it's best to talk through these things and fully understand what happens next. If you can get your prospect thinking about what they will do next when they achieve their goal, overcome a challenge and/or avoid a consequence, they'll start to visualize what success looks like. Often times, this will help you understand personal motivations of different decision makers.

SLIDE Exploring implications step 1:

"When you achieve goal x, what will you do next?"

SLIDE Exploring implications step 2:

"When you no longer have to worry about consequence y, how will you feel?"

SLIDE Exploring implications step 3:

"Who stands to gain the most when this plan works?"

Let's put all the pieces of CGP and TCI together.

After you've covered CGP, which is your prospect's challenges, goals, and plans, you need to dig into TCI, which is their timeline, consequences, and implications. Once you've helped them define a timeline and you've drawn out of them the negative consequences of inaction, and the positive implications of making a change, they'll see the urgency of their situation and be ready to get into the logistics of moving forward with your solution.

VIDEO - Ending an Exploratory Call

You've now used CGP to uncover your prospect's challenges, goals, and plans.

You've also used TCI to help them express their timeline for making a change, the consequences of missing that timeline, and implications of taking the right action. Before you wrap up the call, you need to make sure they know the process for taking that action itself.

SLIDE What if you and your prospect don't have a shared vision of resources and approval?

Without mutual understanding, it's unlikely that you'll be able to come to a final agreement.

Slide Let's start with a budget.

You need to talk about BA: budget and authority.

SLIDE You should look at costs from the prospect's perspective, not yours.

Consider any costs involved to execute their plan, not just the cost of your solution. Discuss time investments as well as financial investment requirements.

SLIDE The budget conversations should come after the challenges, goals, plan, and consequences.

Table 3. CGP, TCI, BA

C The CHALLENGE your prospect is trying to overcome	"Do you ever struggle with X?"
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B The prospect's BUDGET	"What do you plan to invest to achieve this goal?"
A The AUTHORITY required to move forward with your solution	"Who needs to be involved in this decision?"



SLIDE Get a feel for numbers that will impact what the prospect should be willing to spend.

In the goal conversation, you should have determined how much money they stand to gain or save.

SLIDE In the plan conversation, you can determine the cost of the alternative plans.

You can also help them evaluate current spending on inferior solutions.

Understanding the cost of challenges or consequences can also compel an investment that can eliminate or avoid them.

SLIDE Ask the prospect a direct question about their financial situation.

SLIDE Use what you know when exploring budget.

"Based on our conversation, it seems like you're spending x dollars on a solution that's not helping you get to where you want to go. What did you plan to invest so that you're 100% confident that you'll achieve your goals?"

What about discussing price?

There was no mention of discounting to close the deal. There was no "If I can do this for you, will you move forward now?" That's what salespeople who are interested in their own short-term goals say, who are willing to compromise their long-term relationships and who gamble their chances of receiving referrals.

SLIDE Be an inbound minded salesperson.

Focus on guiding and advising prospects who value your differentiation.

Take your time covering goals, challenges, plans, and consequences.

Otherwise, you'll find yourself in a position where prospects have the upper hand in negotiations on price. But, if you thoroughly explore the opportunities using this framework, you'll find yourself in a position where you're the best choice for your prospect.

SLIDE It's the prospect's decision to either pay your price or continue dealing with their challenges.

SLIDE The final piece of the CGP, TCI, and BA framework is A for authority.

Table 4. BA

BA

B The prospect's BUDGET

"What do you plan to invest to achieve this goal?"

A The AUTHORITY required to move forward with your solution *"Who needs to be involved in this decision?"*

SLIDE It doesn't make sense to ask authority questions first.

Buying has radically changed in the last decade.

Information is available at the fingertips of everyone.

More junior people are tasked with doing research, meaning they are key, but certainly not the key people in making the decision. With more transparent workplaces, people are empowered to share company priorities, which means you can find out what's going on inside a company from more people. With executives busier and more risk-averse than ever before, decisions must be approved by more and more people, which means there are likely many people involved in making a decision. The right time to ask about decision-making processes is later on.



Understand their goals, challenges, plans, timeline, consequences, and implications.

Understanding all of these things helps you better understand why different people are involved. For example, if consequences or implications impact different people, you now understand why different people are involved in the decision. Of course, there is no substitute for asking the questions.

SLIDE Exploring authority question 1:

"Are you convinced that we can help you better than anyone else?"

SLIDE Exploring authority question 2:

"How have decisions been made like this in the past?"

SLIDE Exploring authority question 3:

"Who needs to be involved in this decision?"

You might want to be prepared with a suggestion.

Base this suggestion on your real experience working with other customers.

SLIDE Exploring authority question 4:

"Usually, when my clients are making this decision, the following people need to be involved: CFO, VP of Sales, and the VP of Sales Operations. Who covers those responsibilities for your firm?"

SLIDE Exploring authority question 5:

"Do you usually discuss decisions like this with anyone in your family or other trusted advisors?"

SLIDE What is your prospect thinking at the end of the exploratory call?

Establish takeaways question 1:

"What were your takeaways from this call?"

SLIDE Establish takeaways question 2:

"Was this call helpful for you? Why?"

If you conducted the exploratory conversation thoroughly using the framework, the answer should be yes!

SLIDE Establish takeaways question 3:

Buyer: "You've definitely opened my eyes to better ways of accomplishing our goals. I'm anxious to implement what we've discussed."

Seller: "What do you think we should do next?"

SLIDE Establish takeaways question 4:

Buyer: "Can we get started?"

What if it is a more complex purchase?

If it's a more complex purchase, if you covered authority well, you should understand their buying process at this point. So if there are additional steps in the conversation, now would be the time to ask or suggest how you can work together on those next steps. If you sell a product or a tangible service, you might be accustomed to putting a presentation together, developing an implementation plan, or writing a proposal or contract.

Whatever the next steps, now is the time to get commitment from the prospect.



This is another place using the framework will help.

Since the framework includes buyer-friendly terms and is presented in a sequence that's logical to a buyer, you can use it to summarize your understanding of their context. By communicating it back to your prospect, you're helping them make the decision to buy from you. By asking them to reflect on their goals, challenges, plans, and timeline, you're getting them to think critically about their situation. These four prospect-friendly words help you understand their unique context through a two-way dialog. Once you understand their context, you're in a much better position to start influencing their future. By suggesting new plans, helping them quantify consequences, thinking through decision making processes and setting a budget, you're helping them plan for a better future. It is a service to them instead of a tool for you.

SLIDE Getting a commitment step 1:

You: "Before we wrap up, would it be ok if I share my understanding of our conversation today?"

Prospect: "Yes, that'd be great."

SLIDE Getting a commitment step 2:

You: "As I understand it, your goals are x, y, and z. Challenge a and b currently stand in the way of achieving these goals. Your current plan is to implement a and b. But, you're worried about challenge c cropping up as you start to implement plan a. Additionally, you've already tried a and it didn't work. So, you're worried that a and b just won't get you to your goal. Today, we discussed a few alternative plans that might help you overcome all of your challenges and achieve your goals. Based on our discussion today, you seem confident that this new plan will get you where you need to go, help you avoid consequence c, and do it all within a timeline and budget that will be acceptable to the whole team. Did I miss anything important?"

Prospect: "That was an excellent recap. I appreciate how effectively you listened during this call and really helped me brainstorm solutions. I'm really excited for next steps."

SLIDE Be prepared to go slow and confirm points if things are going easy.

Book more time if you're not on the exact same page.

You can recap the conversation with an email using the CGP framework.

It should say the exact same thing you said verbally. While you might have several similar conversations on a weekly basis, your prospect probably hasn't. Putting it in writing helps you get on the same page, as well, if there are any lingering disconnects. Recap emails also keep everyone on the same page as time goes forward. They also help your prospect with internal communication.

CGP, TCI, and BA is an excellent framework to guide your exploratory sales calls.

At the beginning of the call, set the tone and trajectory of the call, and then get into CGP: your prospect's challenges, goals, and plans. Once you understand what your prospect is trying to accomplish and what's holding them back, discuss TCI: their timeline for taking action, the negative consequences of not taking action, and the positive implications of moving forward. Then finish the call with BA: budget and authority. When you've covered all that, use CGP, TCI, and BA as a way to recap your discussion to ensure that you and your prospect have a shared understanding of their situation and what needs to happen next. If you do that, you'll be perfectly positioned to move to the final phase of your inbound sales strategy and advise your prospect on the best path forward.