

Care Enough to Expect Excellence!

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Agenda

- **Celebrating FAILURE!**
- **Updates and check in on training progress**
 - **Evaluations**
 - **Accountability**
- **Best practices around management follow up after training sessions**
 - **Reinforcing in your meetings and conversations**
 - **Sales call debriefing**
 - **Sales process – asking the right questions**
- **Why BA's "lose" deals.**
- **Bottom BA performers: (AKA: Someday Sellers – "Next quarter is gonna be huge!")**
 - **Will – Do they want to succeed? Are they motivated**
 - **Reconnect with personal goals**
 - **Ask: "if nothing changes in the next 90 days, how does this impact you?"**
 - **Skill – Do they know how to do it? (no-pressure prospecting, booking IM's, running effective sales calls)**
 - **Are skill gaps identified?**
 - **Behavior – Are they actually doing the behaviors?**
- **Mindset Shift for Leaders**
 - **Coaching the bottom 20% is not about saving everyone. It's about giving them a fair shot with structure, clarity, and accountability.**
 - **But it's also about protecting the G&A culture – your A-players are watching!**



**AND REALIZE
THE
FAILURE
IS JUST
NOT TRYING**

BUSINESS
INSIDER

1. Lead with Vulnerability

- Share your own recent mistakes or failed calls.
- Model emotional safety—focus on what you learned.
- Example: “I bombed a conversation last week by skipping the budget step. Here’s what I learned...”

2. Build a Culture of Psychological Safety

- Normalize failure as part of the sales process.
- Reinforce that smart risks are rewarded even if they don’t pan out.
- Praise effort and reflection, not just new opportunities and closed deals.

3. Create a Recurring 'Failure Share' Ritual

- Start huddles with: 'What’s a recent failure you had and what did you learn?'
- Offer a light-hearted award for the most insightful failure of the week.
- Make it fun, fast, and regular.

4. Reinforce that Risk = Growth

- Use phrases like:
 - If you're not failing, you're not stretching far enough.
 - Comfort kills sales. Discomfort is where growth lives.

5. Debrief Wins AND Losses

- Conduct post-mortems on no-decisions and losses.
- Ask: Did we skip a step? Did we uncover real pain?
- Focus on patterns and lessons, not blame.

6. Use Sandler Tools to Support It

- Tie failure discussion into the Success Triangle: Behavior, Technique, Attitude.
- Use pre-call plans and post-call debriefs to uncover tactical misses.
- Coach around belief systems that may hinder risk-taking.



Sustainment...



90%

Over 90% of what is learned in a training environment will be forgotten if no conscious effort is made to retain it . 50% is forgotten in 24 hours, and 90% in 7 days. If training delivery is not followed by rigorous on the job application of new skills and training reinforcement, the “forgetting curve” sets in

Initial 2-Year Sandler Engagement & Impact Roadmap

Goal: Achieve 80% engagement and measurable impact from the sales team over an initial 24-month term. This roadmap outlines four strategic phases to embed Sandler methodology into the G&A sales culture.

Phase 1: Baseline & Buy-in (Months 1–4)

- Conduct initial discovery, assessment, and initial training immersion.
- Begin working with sales leaders in coaching Sandler behaviors.
- Begin to identify champions and early adopters.
- Build trust within the team base.
- New hire plan of action.

Phase 2: Activate & Align (Months 5–12)

- Begin reinforcement cadence and Sandler best practice sessions.
- Facilitate role-plays and debrief wins/losses.
- Essentials certification.
- KPI: 70% of BA's attend sessions, 70% using Up-Front Contracts & Core Essentials sales strategies/techniques.

Phase 3: Scale & Solidify (Months 13–18)

- Embed Sandler into onboarding, CRM stages, and sales process.
- Group coaching for mid-performers to drive consistency.
- Celebrate success through leaderboards and Sandler moments (establish Champions).
- Sandler Coaching for Leaders.
- KPI: 60% of reps hit behavior goals; closing ratio +10–15%.

Phase 4: Sustain & Optimize (Months 19–24)

- Peer-led reinforcement and ongoing role-play routines.
- Quarterly behavioral scorecard reviews and coaching audits.
- Recognize and reward Sandler champions.
- Final KPI: 80% of team engaged & effective; 100% leader coaching execution.

80%

	A	B	C
1	Metric	Target	Actual
2	% of reps attending reinforcement	75%+	
3	% using Up-Front Contracts regularly	60%+	
4	% of sales leaders coaching weekly	100%	
5	Revenue growth vs baseline	+10%	
6	% reps with 3+ months of behavior success	60%+	
7	% of team 'engaged & effective'	80% by month 24	
8			



Call Debrief Tool

Client Contact:			
Client Organization:			
KARE Profile:			
Selling team attendees:			
•			
•			
New information learned:			
•			
•			
Next steps planned:			
•			
•			
Red flags/potential problems uncovered:			
•			
•			
Questions/topics for next contact:			
•			
•			
Action Steps:	Who?	When?	Intended Result?

G&A Partners – Sales Call Debrief		
NAME:	DATE:	LOCATION:
LESSONS LEARNED:		
WHAT IS MUTUALLY AGREED TO HAPPEN NEXT?		
COMPARTMENT/TOOLS	DESCRIPTION	
BONDING & RAPPORT	Active Listening	
	OK-not OK, Struggle on purpose DISC Style (D, I, S, C)	
U.F.C.	Meeting Purpose	
	Time	
	My Agenda	
	Their Agenda	
No - Yes - T.I.O.		
PAIN	1st Level Pain	
	What is the Pain?	
	How long? What have they tried to fix it?	
	2nd Level Pain	
	Who else does this effect?	
What is the financial impact on them?		
BUDGET	3rd Level Pain	
	How do they feel about this?	
	What would happen if they did nothing?	
DECISION	Review Pain (SVIC)	
	What would they Invest to Remove Pain?	
	Will they invest time, energy, and effort?	
FULFILLMENT	Review Pain, & Budget	
	Who Else?	
	Process & Timeline (visual)	
	Established Pain by Persona?	
POST-SELL	Review Pain, Budget and DMP	
	All "Decision Makers" present?	
	Thermometer Close, What Happens Next?	
Only address the Pains.		
POST-SELL	What did I do to stop buyer's remorse?	
	Handle the competition/incumbent?	
	Did I ask for introductions?	

Sales Stages

Required to Create Opportunity:

- Initial meeting completed
- Prospect is G&A-Qualified
- Prospect shows interest
- Prospect has provided or promises to provide docs (Census, Benefit Summary)
- All stakeholders identified
- Aligned on next steps



	Stage 1 Data Gathering	Stage 2 Confirmation	Stage 3 Proposal	Stage 4 Calibration	Stage 5 Negotiation	Stage 6 Verbal	Stage 7 Closed Won
Objective	Gather enough information to submit to Underwriting.	Review rates and home in on scope of services and budget. Confirm intent to move forward with Proposal	Develop and present a full proposal that aligns client pain points to G&A solutions	Address any objections or concerns the customer has.	Address any concerns and finalize the CSA.	Finalize terms of sale.	Finalize the sale.
General Key Activities	<ul style="list-style-type: none"> • Send prospect RFI documents needed • Follow up with prospect to ensure docs received in time to meet their 1st pay date timeline • Once docs received, submit rate request to Underwriting 	<ul style="list-style-type: none"> • Rates received back from Underwriting • Preliminary review of numbers with prospect/broker • Gain prospect buy-in to formal proposal meeting • Share digital demo • BA determines if worth pursuing 	<ul style="list-style-type: none"> • Build proposal • Present proposal to stakeholders • Establish clear next step to revisit proposal 	<ul style="list-style-type: none"> • Support prospect's effort to research G&A to help them move Maybe to Yes • Formal live demo if requested • Provide references if requested • Follow up questions or revisions on the proposal 	<ul style="list-style-type: none"> • Review CSA with prospect • Answer any questions or concerns in the CSA • Discuss and confirm method of payment and any necessary collateral • Obtain any needed approvals for deal modification/exceptions 	<ul style="list-style-type: none"> • Obtain verbal commitment. • Agree to move forward, align onboarding needs with all teams and Client • Pre-onboarding call (BA confirms onboarding/sales handoff information with client) • BA sends heads up to Onboarding team 	<ul style="list-style-type: none"> • Client accepts credit terms proposed by Treasury • Submit to Risk for final review • Formerly submit to onboarding
G&A Gated Items	<ul style="list-style-type: none"> • Census • Summary of current benefits 	<ul style="list-style-type: none"> • Internal cost analysis (benefits comparison) • RSD/VP pricing approval • Initial Risk review (blue/gray collar) 	<ul style="list-style-type: none"> • Proposal 	<ul style="list-style-type: none"> • Demo (upon request) • Client references (upon request) 		<ul style="list-style-type: none"> • Credit Review 	<ul style="list-style-type: none"> • Credit Review • Final Risk Review • Sales handoff call scheduled with Onboarding
Cross-Functional Involvement	<ul style="list-style-type: none"> • Sales • Sales Support (RSA) • Underwriting 	<ul style="list-style-type: none"> • Sales • Sales Leadership • Underwriting or G&A Beneficial (GAB) • Risk 	<ul style="list-style-type: none"> • Sales 	<ul style="list-style-type: none"> • Sales • Sales Engineering • Client Success Team 	<ul style="list-style-type: none"> • Sales • Legal • Sales Leadership 	<ul style="list-style-type: none"> • Sales • Onboarding • Treasury 	<ul style="list-style-type: none"> • Sales • Onboarding • Risk
Stage Duration	10 Days	7 Days	7 Days	7 Days	7 Days	7 Days	2-3 Days
Closing Probability	5%	10%	25%	50%	70%	90%	100%
Exit Criteria	<ul style="list-style-type: none"> • All documents received from Prospect • Rate request submitted to underwriting • Rates received back from Underwriting • Aligned on next steps 	<ul style="list-style-type: none"> • Proposal meeting scheduled • All documentation needed to create formal proposal • Aligned on next steps and timeline expectations • Pricing approval obtained 	<ul style="list-style-type: none"> • Proposal has been presented to the prospect; questions answered • Aligned on next steps and timeline expectations 	<ul style="list-style-type: none"> • Request CSA upon confirmation prospect wants to move forward • Aligned on next steps and timeline expectations 	<ul style="list-style-type: none"> • CSA sent to prospect • Aligned on next steps and timeline expectations 	<ul style="list-style-type: none"> • CSA signed • Treasury approved • Onboarding call scheduled • Final check of fees, revenue, etc. 	<ul style="list-style-type: none"> • Completion of kickoff call • Closed Won in Salesforce

1. Data Gathering – 5%

- What pain or compelling event prompted the prospect to meet?
- What documents have been received? What's still missing?
- What insights did you gain about their current benefits plan?
- Who are the stakeholders? Have all been identified?
- Did you set a clear Up-Front Contract for the next step?
- Fully profiled? CPA? Health renewal date? Broker?
- What signs showed they were willing to engage further?

2. Confirmation – 10%

- What specific business pains did they share? Are they just surface-level?
- What is the prospect evaluating now?
- How much is that pain costing them (time, money, risk)?
- Have they agreed it's a high enough priority to fix now?
- What was their reaction to the initial numbers?
- How was the budget and buying timeline confirmed?
- What commitment did they give to a formal proposal meeting?
- What is the broker's level of engagement?
- What's the most likely reason they would or wouldn't move forward?
- Have they under invested in an attempt to solve in the past?
- What's your confidence level the deal will close?

3. Proposal – 25%

- Did you confirm all three qualifiers (pain, budget, decision) before presenting the proposal?
- How confident are you they will meet their first pay date timeline?
- Are they prepared to make a decision (Ultimate Up Front Contract) when you present the proposal? If not, why not?
- How did you ensure the proposal reflected their actual needs?
- Can we meet their expectations?
- Is pricing aligned and approved internally?
- What does the prospect believe happens next?

4. Calibration – 50%

- Are all decision-makers aligned, or is someone quiet?
- What objections or questions were raised?
- Have references or additional materials been requested?
- What new information surfaced that shifted the deal?
- What concerns still need to be addressed?
- What's the game plan for your next touch?
- What are you doing to maintain equal business stature here?
- If this deal falls through, where did the process break down?

5. Negotiation – 70%

- What concerns came up during CSA review?
- Have payment terms and internal approvals been clarified?
- Is Legal involved? What's their timeline?
- Have you forecasted the timeline and probability accurately?

6. Verbal – 90%

- Who gave the verbal commitment? Who else needs to approve?
- Are Treasury and Risk aligned?
- Has the onboarding team been briefed?
- What risks remain before signing?
- What's the plan to stay involved post-sale?

7. Closed Won – 100%

- What behaviors helped you win this deal?
- How did you build trust and control throughout the process?
- Were there any points of friction in the process?
- How did the handoff to onboarding go?
- Have follow-up and satisfaction checkpoints been scheduled?
- Is there an opportunity to cross-sell or request a referral?

Breakout

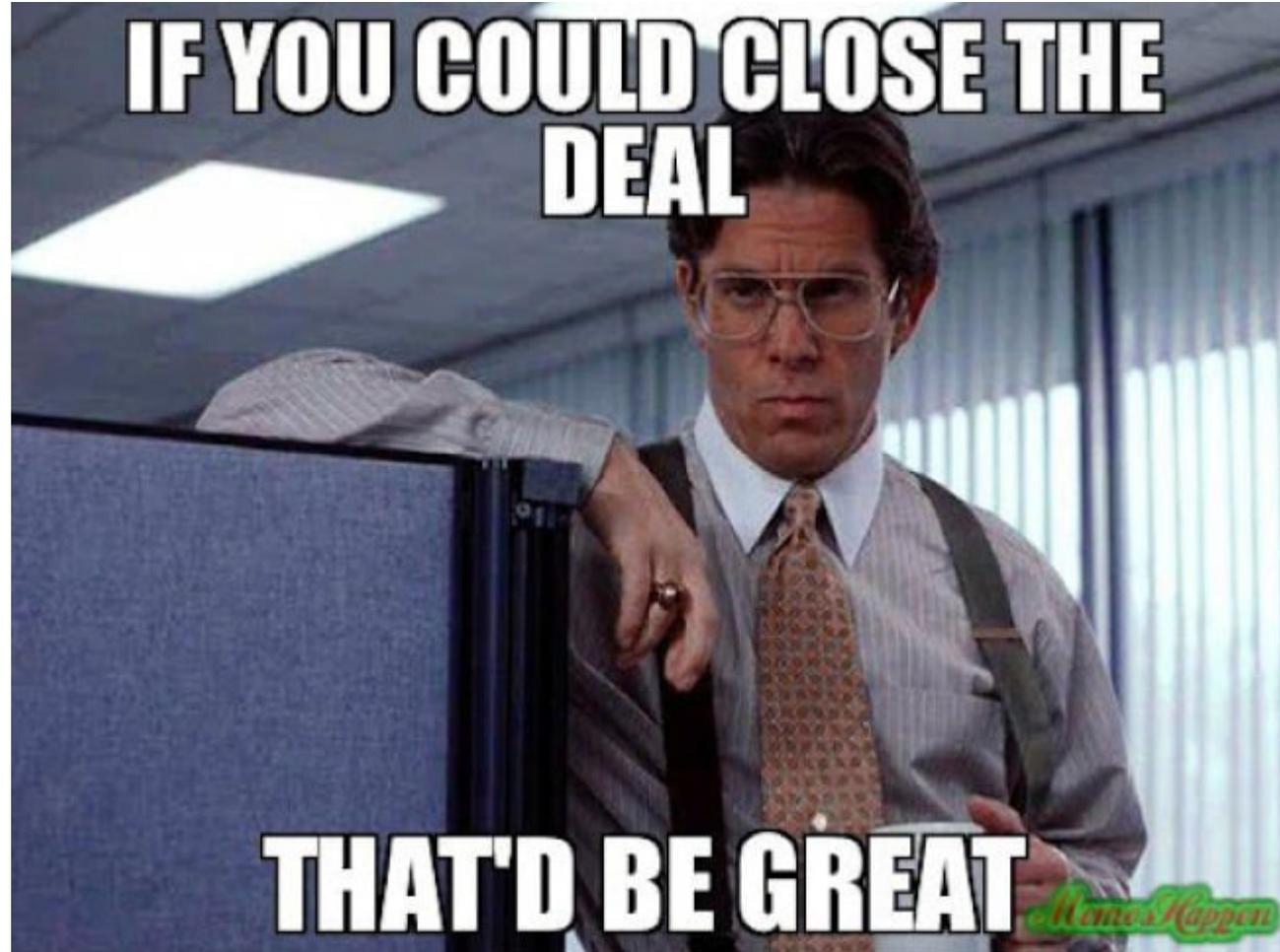
Why BA's Lose Deals

Category	Cause	Description
1. Poor Qualification – including price-based prospecting	Weak budget/timeline clarity	Reps fail to confirm decision-making process, budget approval, or buying urgency. No EBS.
	Selling to the wrong person and/or not meeting with all key buyer personas	The BA never reaches true decision-makers (CEO, CFO, etc.) or relies too heavily on HR.
	Prospect may not be the right fit	
2. Lack of Compelling Pain	No emotional pain uncovered	BA sticks to surface issues (compliance, time savings) without digging into cost, risk, people pain, and investments needed.
	Prospect is “comfortable enough”	Without urgency or dissatisfaction, there's no motivation to switch.
3. Selling Instead of Qualifying	Feature-dumping too early	BA's lead with product/benefit pitches instead of qualifying first.
	Proposal too soon (PPS)	BA's send proposals before the prospect is fully engaged and/or do not formally present “live”.
4. Competitive Loss	Undifferentiated offering	Prospect doesn't see how G&A is meaningfully better than others.
	Price-based loss	Prospect chooses a lower-cost PEO because value wasn't established.
5. Internal Missteps	Sloppy follow-up or delays	BA's miss follow-ups, delay proposals, or fumble the handoff to underwriting.
	Limited reinforcement from leadership	Sales managers fail to hold BA's accountable to each stage's criteria.

Closed LOST

- What was the real reason this deal was lost?
- Did you document the reason properly in Salesforce?
- What early warning signs did we miss?
- Did you fully qualify pain, budget, and decision before moving forward?
- Did you recap the pain (issues) if you had the opportunity to present the proposal?
- What are you doing to stay “top of mind” for the future?
- What would you do differently if you had this one back?

Breakout – What is your team’s plan to “revive” lost deals?



Loss Prevention

- **Pain Funnel:** Builds emotional urgency and real motivation to change.
- **Up-Front Contracts:** Greatly reduces ghosting, delays, and misalignment.
- **Budget & Decision Process Questions:** Ensures qualification before proposal.
- **Reverse Selling:** Encourages prospects to sell *you* on why they want to move forward.
- **Post-Sell Step:** Helps lock in verbal commitments and avoid buyer's remorse.

