

BONUS MATERIAL

Appendix 0: Integrating CRAFT – The Intelligence Layer

The CRAFT methodology is not a replacement for your existing sales methodology (e.g., MEDDPICC, Challenger, Sandler). It is the Intelligence Layer that determines where, who, and why to invest your limited time. Your existing methodology handles the mechanics of *what* to say and *how* to process the deal. CRAFT ensures you are only processing Tier One deals.

The integration strategy is to use CRAFT as a Mandatory Pre-Gate to your current CRM stages.

1. The Integration Philosophy: CRAFT as the Continuous Intelligence Engine

CRAFT is a **continuous operational system** that provides the critical intelligence needed to guide every action, from initial targeting (where the work is *heavily weighted*) through final commitment and long-term expansion. While the methodology acts as a mandatory **Pre-Gate** for qualification (0-30%), its principles of *validation* and *control* are essential for advancing every stage to Closed Won and beyond.

Methodology	Focus	Where CRAFT Fits
Existing Methodology (e.g., MEDDPICC)	The Deal Execution: What steps to take, what forms to fill, how to close.	Artifact Validation: CRAFT artifacts (e.g., Quantified Pain) become the Mandatory Evidence required to advance the MEDDPICC checkpoints.
CRAFT (Chapters 1-6)	The Intelligence & Targeting: Where to invest time, who to engage, and how to gain control.	The Intelligence Layer (Continuous): Used for Qualification (0-30%), Validation (30-80%), and Commitment (80-100% \rightarrow Expansion).

The Core Change: Your team can no longer say "I am at Stage 3: Value Confirmed" simply because they *asked* discovery questions. They must present the **Artifact** (e.g., "The Value/Pain Dossier (Quantified)") proving the customer *agreed* to the value.

2. The Implementation Plan: 30/60/90 Day Roadmap

A successful rollout requires executive sponsorship, clear definition of the **Artifacts** (Chapter VII), and management accountability.

Day 0-30: Establishing the Foundation (Targeting & Qualification)

Objective	Action Required	Deliverable
Executive Alignment	Secure executive commitment that CRAFT is the mandatory pre-gate.	Executive Mandate published, linking CRAFT success to forecast accuracy.
Tool Integration	Implement the FLOW Scorecard (Ch. 1) as a mandatory field/score in the CRM (Salesforce).	All new leads must have a documented FLOW Score before being assigned.
Initial Training	Distribute the CRAFT paperback to the team. Focus training entirely on Conduct Research and Refine & Target.	Reps must accurately map 3 existing Tier One customers using the 7 Power Profiles and score 5 new targets with the FLOW Scorecard. Mandatory reading: Chapters 1-3.
Metric Change	Stop measuring meetings booked (Activity). Start measuring FLOW Scorecard Submissions and Tier 3 Purge Rate (Discipline).	Leader's forecast audit begins: Zero Tolerance for Tier 3 deals in the active pipeline.

Day 31-60: Mastering Activation and Diagnosis (Control & Value)

Objective	Action Required	Deliverable
Advanced Coaching	Create and run a mandatory Training Workshop to walk the team through each chapter (3-5) and practice applying the methodology.	Training Workshop Completion: Reps demonstrate role-play proficiency in the 90-Second Takeover and MINE Driver diagnosis.
Artifact Definition	Lock down the CRM artifacts for the 50% stage.	CRM Field Mandate: The Value/Pain Dossier (Quantified) must be attached to advance to SFDC Stage 4 (Solution Dev).
AI Integration	Download AI prompts for Conduct Research and Refine & Target, build them into your company's AI engines, and demonstrate live how to use the prompts to generate artifacts.	Dedicated "Intelligence Analyst" training on prompt engineering to automate research.

Day 61-90: Sustaining Discipline and Forecasting

Objective	Action Required	Deliverable
-----------	-----------------	-------------

Manager Accountability	Managers must run forecast calls based solely on the Artifact Roadmap (Chapter VII) and use deal reviews as an intelligence audit.	Forecast Audit: Managers review top FLOW targets and verify compliance with the \$2^5\$ contact regimen (Chapter 3).
Best Practice Sharing	Highlight successful application of Consequence Trust (Level 4) strategies (Chapter VI).	Reps present 2 successful Inside-Out expansion wins to the team, highlighting the Ego driver they leveraged.
Culture Change	Integrate the Operator's Oath into team meetings and performance reviews.	CRAFT language becomes the default language of sales and forecasting. Discipline replaces optimism as the primary cultural value.

3. CRM Field Mandate (Salesforce)

To enforce the CRAFT discipline and enable artifact-based forecasting, mandatory custom fields must be created on both the **Opportunity** and **Contact** objects.

A. Opportunity Object Fields (Tracking Viability and Artifacts)

Field Name (Internal)	Type	Purpose (CRAFT Alignment)
CRAFT_FLOW_SCORE__c	Number (Formula or Rollup)	Tracks the final Weighted FLOW Score (0-24) to enforce Tier One qualification (Chapter 1).
CRAFT_FLOW_TIER__c	Picklist	Displays the resulting tier: Tier One, Tier Two, Tier Three. Used for mandatory purge reporting.
CRAFT_ARTIFACT_STATUS__c	Picklist (Multi-stage)	Tracks the completion of the major gates: Value/Pain Dossier Secured, Validation Charter Secured, EB Confirmation Secured.
CRAFT_QUANTIFIED_PAIN__c	Currency	Documented, customer-agreed cost of the problem/loss in currency (M - Metrics).

CRAFT_TARGET_GOAL__c	Text Area	The required outcome/value statement (e.g., "Reduce compliance risk by 25%") based on validation (M - Metrics).
CRAFT_RISK_FLAG__c	Multi-Select Picklist	Active, high-level risks (e.g., Guardian Block, Saboteur Active, Vendor Lock-in Fear). Used for manager coaching audits.

B. Contact Object Fields (Tracking Power and Motivation)

Field Name (Internal)	Type	Purpose (CRAFT Alignment)
CRAFT_POWER_PROFILE__c	Picklist	Defines the role in the deal: Operator, Guardian, Saboteur, Advocate, Shadow Buyer, etc. (Chapter 2).
CRAFT_MINE_DRIVER__c	Picklist	Tracks the contact's primary personal motivation: Money, Ideology, Necessity, Ego (Chapter 4).
CRAFT_TRUST_LEVEL__c	Picklist	Tracks the current relationship status: Contact, Competence, Confidential, Consequence (Chapter 3).
CRAFT_KEY_OBJECTION__c	Text Area	The single biggest objection this specific contact has raised (Guardian/Saboteur input).

4. Avoiding Conflict with Existing Methodologies

CRAFT is non-conflicting because it works **upstream** of most existing processes.

- **If you use MEDDPICC:** CRAFT provides the intelligence for **M** (Metrics), **E** (Economic Buyer), and the initial **P** (Pain) *before* the formal proposal stage. You are filling in the MEDDPICC blanks with intelligence-grade data.
- **If you use Challenger/Sandler:** CRAFT provides the **insight** needed to *teach* the customer or the strategic alignment needed to define the **Up-Front Contract**. CRAFT is the research engine that powers the conversation model.

By implementing CRAFT as a mandatory Pre-Gate, you ensure your existing methodology is only applied to winnable, high-leverage opportunities.

I. Conduct Research:

The Complete FLOW Target Filter™ Scorecard

The fundamental discipline of the CRAFT Operator is to eliminate weak deals ruthlessly and focus resources only where controllable momentum exists. This section transforms the qualitative research of Chapter 1 into the quantitative tool necessary for Disqualification Discipline. Your goal is to score every target organization before engaging, ensuring you are not wasting time on a "Tamagotchi Deal."

The Weighted FLOW Score (0-24)

This scorecard weights **Force** and **Window** three times higher than other elements. If there's no power driving the initiative (**Force**) or no deadline creating urgency (**Window**), the deal is dead—regardless of your perceived value.

Element	Definition	Score (0-3)	Weight	Total	Scoring Guide (Evidence Required)
F - Force	Driving power / Momentum already in motion.	0-3	x3	0-9	0-1: No visible executive mandate. 2: Confirmed internal initiative. 3: Verified Executive Mandate or funded strategic initiative confirmed through Level 1 Power Signals (e.g., earnings call, C-suite hire, M&A activity).
L - Leverage	Advantage we can apply (unique angle, insight, or capability).	0-3	x2	0-6	0-1: Generic product fit. 2: Clear value prop alignment or proven success in their exact niche. 3: Proprietary Data/Insight that addresses a stated gap or a unique capability validated by multiple sources.
O - Obsession	Proof they care now	0-3	x1	0-3	0-1: Vague interest, no resource allocation. 2: Significant issue confirmed, or relevant senior roles hired

	(Energy + Urgency).				(Director/VP). 3: Major Public Failure/Incident related to the problem or multiple senior roles actively hiring (Level 3 Project/Hiring Signals).
W - Window	Timing reality / Deadline.	0-3	x3	0-9	0-1: Distant FY end, no external pressure. 2: Relevant deadline or Recent Leadership Change within 12 months. 3: Critical Deadline Imminent (6 months or less) or major strategic shift announced, creating an immediate need to act.
Totals	Max Score	12		24	

FLOW Tier Decisions: The Operator's Discipline

Use the final Weighted Score to determine your strategy and resource commitment immediately.

Score Range	Tier	Action (The Operator's Discipline)	Rationale
19-24	Tier One - EXECUTE	Allocate Maximum Resources. Engage now with a defined, high-control strategy.	High probability of controlled movement, high ROI for resource commitment.
13-18	Tier Two - ASSESS	Monitor and Shape. Validate weak signals. Do not commit primary resources until the score moves to Tier One.	Worth monitoring, but needs demonstrable validation of Force or Window before full entry.

0-12	Tier Three - ELIMINATE	Purge Immediately. Remove from active pipeline and forecast.	Low probability, high resource drain. You are operating on hope (a hallucination).
-------------	-----------------------------------	---	--

Usage Note: Combating Hallucinations

The purpose of this scorecard is to replace emotional attachment and guesswork with evidence. Any score of **0 or 1** must be supported by **verifiable signals** (Level 1 or 2 intelligence). If a deal relies on Project Signals (Level 3) or Interest Signals (Level 4), or if **Force** and **Window** are both low, it is likely a **Tamagotchi Deal**—a ghost that consumes time but delivers no progress. **Elite operators eliminate; average sellers qualify.**

II. Refine & Target:

The 7 Power Profiles Matrix and Checklist

The operational success of **Refine & Target** (Chapter 2) hinges on moving beyond the public organizational chart and identifying the individuals who truly command power. Power is revealed by **Proximity to Pain/Risk**, not title. This matrix details the seven archetypes found in every complex deal, providing the checklist and strategy needed to transform a list of names into a functioning influence map.

The 7 Power Profiles: Mapping the Human Terrain

Profile	Core Power Dynamic	Signals & Behavior Checklist	Strategic Action (Operator's Objective)
Operator (Economic Buyer/Champion)	Creates Change. Owns the budget, risk, and outcome.	Reports directly to C-suite; explicitly named as sponsoring the initiative; closest to the consequence of success or failure.	Engage Directly & Earn Trust. Arm them with data, leverage, and the strategic ROI case. (Your Primary Target).
Guardian	Blocks Change. Protects specific domains (Legal, IT Security, Finance). Can say "No" (negative power).	Title focused on risk, governance, audit, compliance, security . Often holds deep institutional knowledge.	Align Early, Address Concerns. Tailor proof to security/compliance/risk mitigation requirements.
Saboteur	Protects Turf. Blocks progress subtly or overtly to retain control or relevance.	Often owns the legacy system or process you aim to replace. Internal rival of the Operator or Champion. Often relies on traditional, manpower-heavy methods.	Identify Early, Neutralize/Isolate. Address their FUD (Fear, Uncertainty, Doubt) with preemptive, third-party validation and data.

Shadow Buyer	Influences Off-Record. Trusted advisor who carries political capital but not necessarily the title.	Long tenure (15+ years), respected expert, often a trusted advisor mentioned in executive bios (e.g., Chief of Staff, Fellow, Distinguished Engineer).	Locate through Intel, Engage Carefully. Their opinion often seals the deal; secure their buy-in on the technical or operational approach.
Bureaucrat	Enforces Process. Focuses on rules, procurement, PMO, or vendor management.	Driven by checklists, RFPs, and timelines. Can delay the deal but rarely kills it (unless requirements are unmet).	Navigate Efficiently, Contain Influence. Treat as necessary process, not power; pre-emptively satisfy requirements.
Advocate	Feels the Pain. Supports the solution, but lacks budget or authority to drive the deal alone.	Roles directly experiencing pain (e.g., front-line managers, technical leads). Valuable sources of ground-truth intel.	Recruit for Intel, Equip, Manage. Arm them with the ROI case to support the Champion.
Tourist	No Power/Pain. Consumes time out of curiosity or obligation.	Requests information without a clear link to power/budget signals. No risk related to the decision.	Avoid Politely, Disqualify Quickly. Redirect or eliminate to protect your time and resources.

Key Operational Tradecraft

- **The Deference Test:** Observe who people *react* to, not just who they *report* to. Deference patterns (a guard straightening, a junior staffer scrambling) reveal true, informal power faster than any org chart.
- **The Risk Test:** Find the person under the most pressure, the one with the most **skin in the game** (personally or professionally) regarding the outcome of the decision. That person is closest to the power relevant to your deal.

- **The Shadow Test:** Never assume the decision-maker is the one with the biggest title on the org chart. In complex sales, the decision is often influenced or *made* off-the-record by the **Shadow Buyer**.

III. Activate:

The 90-Second Takeover & Trust Ladder

Activation is not about selling prematurely; it's about **engineering the conditions under which the target wants to meet**. This phase must establish credibility and control before the conversation starts. Without discipline here, you risk being relegated to a transactional vendor.

A. The 90-Second Takeover Framework

First contact is the moment of power transfer; the perceived dynamic is set in the first three minutes. Use this framework to establish **Command Posture** and define the mission's scope immediately.

Step	Action (Objective)	Required Output
1. Acknowledge & Set Intent	Briefly acknowledge their time, then state your specific, customer-focused purpose for the meeting.	<i>Signal: I respect your time; I have a clear reason to be here.</i>
2. State Hypothesis (Based on Research/Signal)	Reference the validated insight or Level 1/2 Signal that led to the meeting, framing it as a potential high-stakes problem or risk for them.	<i>Signal: I've done my homework; I understand your world.</i>
3. Define the Mission (for this meeting)	Clearly state what you aim to achieve together in the allotted time (e.g., validate the hypothesis, determine next steps).	<i>Signal: I am leading this process to a productive outcome.</i>
4. Confirm the Path (Agenda Control)	Briefly outline how you'll use the time and ask for their explicit agreement.	<i>Signal: I seek mutual control; I am not submitting to your default agenda.</i>

Frame Control Law: The first frame introduced tends to become the dominant frame, unless it is actively broken and replaced by a stronger one. If you start passively, you signal subordination and become a vendor.

B. The Four Levels of Trust (The Currency of Access)

Trust is a risk calculation; people trust you when they believe you will protect them from harm or risk. You must progress through these levels sequentially to unlock access to sensitive information and influence.

Level	Name	Trust is Earned When...	Result of Achievement
1	Contact Trust	You demonstrate basic courtesy, punctuality, and professionalism.	You get meetings and returned communications.
2	Competence Trust	You provide relevant insights, ask intelligent questions, and demonstrate deep technical or industry expertise.	You get technical evaluations and deep discussions.
3	Confidential Trust	You demonstrate discretion and prove you will not exploit internal political context or vulnerabilities.	You get the truth and access to hidden pain/blockers.
4	Consequence Trust	You actively protect the stakeholder from risk/failure and ensure their long-term success.	You get advocacy, long-term partnership, and referrals.

IV. Find the Value/Pain:

The MINE Driver Diagnostic

Elite operators don't sell features; they sell the **elimination of acute, verifiable pain** and the **acquisition of measurable value**. The mission of this phase is to move past surface-level *symptoms* ("reporting is slow") to the deeply consequential *pain* ("missing financial targets" due to slow reporting) and the underlying **MINE Motivations** that drive executive action.

The MINE Driver Diagnostic Table

Use this table and the corresponding questions to connect the organizational problem directly to the personal risk or reward of the stakeholder.

MINE Driver	Focus of Pain/Value	High-Leverage Question (Probing MINE)	Example of Value to Frame
M - Money	Financial loss, cost, inefficiency, capital expenditure.	"What is the quantifiable, bottom-line impact of this problem? If you solve it, what is the ROI on that investment?"	Cost Savings , Increased Revenue (NRR, NCV), Financial Security, Improved Margin.
I - Ideology	Strategic failure, vision, competitive parity/advantage, market reputation (FOMO).	"Given the company's stated focus on [Strategic Initiative/Goal] , how does this issue hinder that core objective?"	Competitive Advantage , Innovation Leadership, Achieving Mission, Enhanced Reputation.
N - Necessity	Operational disruption, compliance failure, critical events, mandatory requirements.	"If this process breaks down further, what is the worst-case scenario from an operational or compliance standpoint?"	Risk Mitigation , Operational Stability, Immediate Problem Resolution, Regulatory Compliance.
E - Ego	Status, control, reputation, personal career risk/advancement.	"If you successfully champion this solution and deliver the value we discussed, what would that mean for you personally ?"	Enhanced Status , Increased Control, Career Advancement, Recognition, Protected Reputation.

Key Operational Tradecraft

- **Differentiate Symptoms from Pain:** The symptom is the observable issue ("Our fleet visibility is patchy"). The **Pain** is the negative consequence ("Unreliable tracking leads to -300k in losses and reputational friction"). Focus solely on the pain.
- **The Unspoken Driver:** High-stakes decisions are rarely made purely for financial reasons (*Money*). They are often driven by the risk of **Personal or Reputational failure** (*Ego/Necessity*). Use **Confidential Trust** (Level 3) to uncover these drivers.
- **Frame the Value, Not the Feature:** Never talk about a feature without immediately linking it back to the pain. If a feature solves an issue, the *Value* is the measurable elimination of that negative consequence.
- **The Operator's Silence:** After asking a **High-Leverage Question**, remain silent. The prospect needs time to calculate the answer, often revealing deeper insights (and MINE drivers) than you initially expected.

V. Tailor & Validate:

The Champion's Validation Checklist

The **Tailor & Validate** phase (Chapter 5) is the proving ground where a proposed solution must demonstrate its ability to deliver the agreed-upon value under scrutiny. This stage focuses on two missions:

1. **Validation:** Proving the solution works against objective metrics.
2. **Tailoring:** Configuring the solution, the proposal, and the message to secure buy-in from the entire influence ecosystem.

This checklist arms the operator with the tools needed to manage the validation phase and equip their internal Champion for the final close.

The Champion's Validation Checklist

Element	Required Action (Tailoring)	Champion's Internal Mission
1. Define Success	Jointly document Mutually Agreed Metrics <i>before</i> the pilot or proof of concept (POC) begins. Must include both operational goals (e.g., latency reduction) and financial/strategic goals (e.g., risk mitigation value).	Ensures all stakeholders (Operator, Guardian, EB) share an objective definition of a successful outcome, preventing moving goalposts.
2. Tailor the Proof	Deliver validation results (pilot data, technical specs) tailored to address the MINE Drivers and specific objections of each key persona. Show the Guardian security, show the Operator efficiency, show the EB the money.	Neutralizes Guardians (security/compliance concerns) and disarms potential Saboteurs (FUD) with irrefutable, targeted evidence.
3. Arm the Advocate	Provide concise summaries of successful outcomes (tied to metrics) and clear, evidence-based counter-arguments to anticipated objections and competitor FUD campaigns.	Enables the Champion to advocate effectively and confidently in closed-door meetings where the operator isn't present.
4. Formalize Value (ROI)	Translate the validated metrics (achieved results) into a compelling, high-level ROI/Business Case	Justifies the required investment and ensures the final decision is

	summary, focusing on the strategic and financial impact for the Economic Buyer (EB) .	based on quantified value, not arbitrary pricing or features.
5. Secure Next Step	Seek explicit, incremental commitment <i>before</i> submitting the final proposal: "If we meet Metric C by the end of the pilot, are you prepared to fully recommend this to the EB?".	Prevents the deal from stalling and secures the Champion's full, active commitment to navigate the final legal and procurement hurdles.

Key Operational Tradecraft for Validation

- **Preemptive Objection Handling:** Do not wait for the Saboteur or Ghost to raise a roadblock. Anticipate the three most likely objections (e.g., price, integration, security) and include the counter-argument and supporting proof point (from a use case or pilot result) directly in the proposal.
- **The Power of Social Proof:** Leverage use cases (even anonymized ones) where peers or direct competitors struggled with the same pain and achieved success using your unique approach. This creates urgency and reduces perceived risk.
- **Final Alignment (The SOW):** The Statement of Work (SOW) is not just a legal document; it is the culmination of all validated intelligence. Ensure it meticulously details the validated pains, the agreed-upon metrics, and the specific tailored solution before it goes to the EB. This ensures no last-minute surprises.

VI. CRAFT for Expansion: The Inside-Out Framework

The CRAFT methodology is built for deep penetration into net-new, cold accounts. When engaging existing customers for expansion (upsell/cross-sell), the methodology must be adapted to leverage your greatest asset: pre-existing trust and access to internal intelligence. This "Inside-Out" framework focuses on accelerating the cycle and mitigating the risks of vendor lock-in.

Part A: Identifying the Right Customer & Aligning Solutions

In an existing account, the biggest risk is **Complacency**. You cannot assume the success of the initial deal (Project A) makes the next deal (Project B) inevitable. Every new expansion opportunity must be re-qualified with the same rigor as a Tier One prospect. You are not selling to the *company* again; you are selling to a *new Operator* in a *new division* with a *new pain*.

1. Re-qualify: The MINE Test for Expansion

To identify the right division or individual for upsell/cross-sell, you must combine your internal intelligence (data) with the established **MINE Framework** (Chapter 4). Look for verified signals that indicate a division is under acute pressure *outside* the scope of your current solution.

Intelligence Source (Internal Data)	Signal to Hunt	MINE Driver	Focus of Expansion
Customer Success (CS) Logs/Health Score	Deterioration in Service: High support ticket volume, low adoption, or declining health score in an adjacent division.	Necessity	Cross-Sell: A foundational product is failing due to lack of a needed adjacent solution (e.g., selling professional services where adoption is lagging).
Usage Metrics/Audit Trails	Usage Ceiling Reached: The customer is hitting the capacity limit of their current product or relying heavily on manual workarounds.	Money	Upsell: Selling a higher tier or additional volume/seats to remove efficiency bottlenecks and capitalize on existing success.

Account Plan/QBR Notes	Executive Mandate Shift: The customer announces a new strategic objective (e.g., "AI First" or "Shift to Cloud") that your existing product cannot fulfill.	Ideology	Cross-Sell: Aligning a new product (AI solution) with the stated executive vision, making your solution the <i>execution vehicle</i> for the <i>Ideology</i> .
Champion/Operator Check-in	Personal Pain/Ambition: The Champion mentions personal stress due to a problem outside your current scope.	Ego	Upsell/Cross-Sell: Selling a new solution that makes your Champion a hero in a new division, strengthening their internal status and protection.

2. Strategic Product Alignment: The 3-D Framework

Once you identify the pain and the target division, your new product or service must align perfectly with the customer's established ecosystem. Expansion fails when the new product is perceived as a standalone piece of new technology rather than a **low-risk extension of trusted value**.

Dimension	Objective	Strategic Alignment Action
1. Dimension: Data Alignment	Leverage existing trust and data pipelines.	The new product must consume or generate data that is interoperable with the original product. The pitch: "We are not adding a new system; we are expanding the value of the data you already trust us with. It runs on the same Data Model."
2. Dimension: Deployment Alignment	Minimize the Guardian's (IT/Security) resistance.	The new solution should be deployable within the customer's existing architecture, security framework, and change management process (e.g., same cloud tenant, single sign-on). The ask: "You've already approved our security stack once; this is a low-risk extension of that footprint, requiring no new infrastructure review."

3. Dimension: Dependency Alignment	Create symbiotic value where one product enhances the other.	The new solution must actively make the original core product (Project A) more effective or eliminate a key weakness/bottleneck. The value is additive, not parallel. Focus on how the new product increases the initial ROI.
---	--	---

Part B: Timing and Commercial Strategy (The Window and the Ask)

Once you have identified the acute pain (Part A) and secured a meeting with the new Operator (Chapter 3), the mission shifts to controlling the **Window** and structuring a **Commercial Ask** that drives adoption while mitigating institutional risk.

1. Strategic Timing: Controlling the Window

In expansion deals, the **Window** (Chapter 1) is rarely a single date; it is a convergence of internal triggers and existing contractual commitments. Elite operators master this convergence to make their ask feel like a strategic necessity, not an arbitrary sales pitch.

Timing Element	Operational Value	Strategic Action
Renewal Date (Level 2 Budget Signal)	This is the most powerful existing trigger. Integrating your expansion deal with the renewal creates a single, consolidated budget event.	Initiate the expansion conversation 90 to 120 days before the renewal date. Frame the new solution as a Renewal Accelerator or a non-negotiable component required to modernize the existing platform.
New Project/Initiative Kick-off	The organization has already allocated resources and political capital to solve the problem.	Time your proposal submission to coincide with the new project's official kick-off. Frame your solution as the Execution Vehicle required to ensure the success of the funded initiative.
Internal Budget Cycles	Leverage unspent operational funds or pressure to commit capital before a fiscal deadline.	If targeting operational budget (Opex), align the ask with the end of a quarter. If targeting capital expenditure (Capex), align with the start of a major project or the year-end spending push.

2. Commercial Strategy: Pricing for Adoption and Traction

Discounting in expansion is a **strategic weapon**, not a concession. Its primary goal is to lower the perceived risk for the new Operator and accelerate adoption in a new division, creating success stories that justify the eventual, full-price upsell.

- **Pilot Pricing for New Divisions:** For cross-sell into a new division, offer an initial pilot at a strategic price (cost-plus or heavily discounted) for a limited time (e.g., 90 days). The goal is to prove the value on the *new* team's metrics, enabling them to easily fund the full deployment from their operational budget later.
- **The Consolidation Discount:** Integrate the cost of the new product with the upcoming renewal. Offer a tiered discount that incentivizes the customer to purchase both the renewal and the expansion together. This positions the discount as a reward for **strategic partnership**, not negotiation.
- **Focus on Long-Term Value:** Never discount the subscription or license rate long-term. Instead, use one-time discounts on **Implementation, Professional Services, or Training**. This makes the initial adoption easy (removing the Guardians' *Necessity* pain) while preserving the long-term revenue stream.

3. Risk Mitigation: Overcoming Vendor Lock-in

The **Guardian** (IT/Security/Legal) and the **Economic Buyer** often resist expansion due to the fear of being overly dependent on a single vendor—the "all eggs in one basket" problem. This requires a strong counter-narrative focused on **Interoperability** and **Resilience**.

Customer Fear	Operator's Counter-Narrative (Frame)	Strategic Action for Proof
Vendor Lock-in	Frame: We are not selling dependence; we are selling Strategic Integration. Our expansion makes your data more valuable, not more trapped.	Focus on open APIs and interoperability. Demonstrate the ease of extracting data or integrating with non-vendor systems to prove flexibility.
All Eggs in One Basket	Frame: This is a Resilience Strategy. Using a single, secure data and deployment stack reduces your complexity, reduces security risk, and simplifies support.	Show a single dashboard view of the existing product and the new product. Emphasize the single point of contact for support and security compliance.
Budget Risk	Frame: This is a Guaranteed ROI Investment. The new product's success is tied directly to the value of the old product, which we have already proven.	Structure the contract with Success Clauses tied to the validated metrics, reducing the customer's perception of budget risk.

Part C: Contractual and Data Strategy (Mitigating Lock-in Fear)

The biggest barrier to expansion is the **Guardian** profile (IT, Legal, Procurement) who views deeper integration as a dangerous **Vendor Lock-in** risk. To secure a long-term partnership, the operator must frame the expansion not as *dependence*, but as a *Strategic Interoperability* that increases the customer's flexibility and resilience.

1. Contractual De-risking: Structuring the Ask

The final contract must be tailored to address the Economic Buyer's fear of long-term commitment and the Guardian's fear of being trapped.

Commercial Fear	Operator's Strategy	Contractual Artifact
Commitment Fear	Offer a Strategic Off-Ramp. If the expansion product fails to meet the validated metrics after 12 months, the customer has the option to revert to the original, smaller contract without penalty.	Performance Guarantee Clause tied directly to the validated metrics (Chapter 5).
Budget Freeze	Tie the long-term license cost to verified consumption metrics rather than a high, fixed estimate.	Consumption-Based Tiering. Lower the committed base price, but increase the unit cost slightly if usage drastically exceeds expectations. This makes the purchase feel safer and minimizes the Guardian's risk.
Pricing Volatility	Provide assurance that the price will not suddenly jump after deep adoption, creating a high-risk renewal.	Renewal Cap Clause. Guarantee that the renewal increase for the expansion solution will be capped at a reasonable percentage (e.g., CPI + 3%) for the next two cycles.

2. Data Strategy: Proving Resilience

The operator must actively prove that deeper integration increases the customer's data freedom, rather than restricting it. This eliminates the "all the eggs in one basket" objection.

- **Interoperability Guarantee:** Emphasize that the new expansion product is not a closed ecosystem. The pitch must be that your architecture is built on **open APIs** and **standard data models**. The **Guardian** must be guaranteed that data ingested by the expansion product is easily **exportable** and readable by other non-vendor systems.
- **Data Sovereignty:** Assure the customer's legal team that all data remains 100% their property. Frame your expansion not as data ownership, but as a superior **data service layer** that increases the customer's security and control over their own assets.
- **The "De-Coupling" Plan:** Be prepared to provide the Guardian with a concise **Off-Boarding Plan** at their request. This document outlines the process and cost to cleanly remove your expansion product and fully migrate all relevant data, proving you have not created irreversible technical debt. This act of transparency significantly increases **Consequence Trust** (Level 4) and often eliminates the lock-in objection altogether.

This expanded section provides the tactical details necessary to convert the final, most sophisticated resistance point—vendor dependency—into a clear advantage.

Part D: Implementation and Value Realization (Securing Level 4 Trust)

After the contract is signed, the operator's mission shifts from closing the deal to **protecting the Champion's reputation** and ensuring **long-term value realization**. This phase secures **Consequence Trust (Level 4)**, the highest level of influence, which is the foundation for all future expansion and renewals.

1. The Operational Hand-off: Protecting the Champion

The primary threat immediately post-sale is **implementation risk**, which threatens the Champion's internal political capital. A smooth deployment reinforces the Champion's status; a failure destroys it.

- **The Post-Sale 90-Day Mission:** Establish a formal 90-day plan focusing on **adoption** and **value validation**, not just technical installation. The focus is on the human element.
- **Arm the Internal Advocate (Again):** Your Champion needs a steady stream of **positive internal data** to defend their decision. Provide them with concise, weekly "**Success Snapshot**" reports that highlight early wins, key user adoption metrics, and positive internal user feedback.
- **The Guardian Safety Check:** The **Guardian** (IT/Security) must sign off on implementation success. Prioritize meeting the technical and security requirements of the Guardian first, as their approval is required for the platform to move into full

production. Frame the hand-off to your implementation team as a **security assurance** step.

2. Tracking Expansion Metrics: Proving Value (The Long-Term ROI)

The initial ROI case secured the deal, but long-term success requires demonstrating value against **strategic expansion metrics**. These metrics prove the platform's utility across the business, justifying future investment and expansion into new divisions.

Metric Focus	Objective	Strategic Implication
Expansion Readiness	Internal Efficiency Gains: Documenting time/cost savings in divisions adjacent to the deployment.	Proves the solution's potential to eliminate Necessity pain in other departments, creating the next MINE trigger.
Champion Value	Champion's KPI Impact: Directly tie platform usage to the Champion's organizational Key Performance Indicators (KPIs).	Proves the Champion's decision was correct, strengthening their Ego and making them a permanent internal partner.
Platform Adoption Depth	Feature Utilization: Tracking the number of users actively using the most complex, high-value features.	Proves the customer is growing into the full value of the license, justifying the current price and setting up future upsells.
New Division Engagement	Initial Outreach Signals: Tracking internal referrals, new contacts requesting training, or adjacent departments accessing shared data.	Confirms the "Inside-Out" strategy is working, organically pointing the operator toward the next Tier One expansion target.

3. Setting the Stage for the Next Mission

The operator never views a closed deal as the end. It is the beginning of the next cycle. The final step is to leverage **Level 4 Consequence Trust** to plant the seed for the subsequent expansion opportunity.

- **The Strategic QBR:** The Quarterly Business Review (QBR) is not a check-in; it is a **Mission Planning Session**. Frame the QBR discussion around the customer's *next* strategic challenge (the "Unsolved Problem B").
- **Planting the MINE Trigger:** Use successful adoption data to plant a **MINE Trigger** related to the unsolved problem. For example: "The **[X]% efficiency** we delivered in Logistics now exposes the **[Y]% bottleneck** in Inventory Management. That is your **next pain point**."

- **The Internal Referral Ask:** Once the Champion confirms success, secure an **Internal Referral** to the Operator of the next target division. The request should be framed as a joint effort to help the company achieve its overarching strategic goal: "Now that we've made you successful in Logistics, who is the **Operator** in Inventory who is currently tackling this new bottleneck? Let's equip them for success next." (This leverages the Champion's **Ego** and the company's **Ideology**).

VII. The Intelligence-Grade Forecast: CRAFT and MEDDPICC Alignment

Part A: Entering the Deal and Advancing to Qualification (SFDC Stage 1)

The average seller enters a deal based on *interest* ("They took my call"). The CRAFT Operator enters based on **Force** and **Viability**. This stage defines the rigorous criteria for moving a lead from **Prospecting** to **Qualified**.

1. The Entry Gate: Prospecting (SFDC 0%)

- **Operator's Philosophy:** Never mistake *activity* for *progress*. You do not enter a deal simply because someone responded to an email. You are hunting for a Tier One environment.
- **Mandatory Intelligence:** Your research must confirm two things: a compelling hypothesis of high-consequence pain, and verifiable signals of controllable momentum.

CRAFT Stage	Action Required	Artifact (Proof to Advance)	SFDC Stage Gate
C: Conduct Research (Chapter 1)	Execute the Weighted FLOW Scorecard on the target organization.	Tier One Target Dossier: A score of 19-24 on the Weighted FLOW Scorecard. Must have scored 3 on Force (Executive Mandate) and/or Window (Critical Deadline).	0. Prospecting - 1. Qualified

2. Advancing to Needs Analysis (SFDC 20%)

Once a target is qualified, the next mandatory step is identifying who holds the real power. Without access to a key Operator, the deal is a dead end.

- **Operator's Philosophy:** You are not selling to a company; you are selling to a **power network**. You must map it before engagement.
- **Mandatory Intelligence:** Leverage open source intelligence (OSINT) to penetrate the organization's public profile and identify the human nodes of influence.

CRAFT Stage	Action Required	Artifact (Proof to Advance)	SFDC Stage Gate
R: Refine & Target (Chapter 2)	Use the 7 Power Profiles (Chapter 2) to map the key stakeholders related to the pain.	Hypothesized Influence Map (Draft 1): Naming of the likely Operator (Economic Buyer/Champion) and the relevant Guardian (Legal/Security/Finance) persona.	1. Qualified - 2. Needs Analysis

3. Advancing to Value/Pain Confirmed (SFDC 30%)

This stage is the point of initial power transfer. The Operator must successfully establish **Frame Control** and gain access to a key decision-maker.

- **Operator's Philosophy:** You must **earn the right** to a deeper conversation by demonstrating insight, not asking generic questions.
- **Mandatory Intelligence:** The initial meeting must successfully establish command posture and secure the next commitment from the Operator.

CRAFT Stage	Action Required	Artifact (Proof to Advance)	SFDC Stage Gate
A: Activate (Chapter 3)	Execute the 90-Second Takeover in the initial meeting with the Operator.	The Mission Acceptance: A formal meeting secured with the Operator and a confirmed agreement on the next meeting's Mission Objective (i.e., to quantify the pain). Confidential Trust (Level 3) begins to form.	2. Needs Analysis - 3. Value/Pain Confirmed

The **Find the Value/Pain** stage is the most critical checkpoint in the forecast. This is where the deal moves from conceptual interest to **quantifiable financial commitment**.

Part B: Quantifying the Deal and Committing to Forecast (SFDC Stages 50% and 70%)

The purpose of this phase is to secure the **M** (Metrics), **P** (Pain), and **D** (Decision Criteria) in MEDDPICC. No deal should advance past 30% without clear quantification and a plan to secure consensus.

1. Advancing to Solution Development (SFDC 50%)

The operator must move past generic pain ("We need to be more efficient") to **acute, quantified consequence** that links the problem directly to a **MINE Driver**. The deal probability jumps to 50% only when the pain is measurable.

- **Operator's Philosophy:** If the customer cannot quantify the pain, the pain is not real enough to justify a solution. The customer must agree on the **cost of inaction**.
- **Mandatory Intelligence:** The discovery meeting must use the **MINE Driver Diagnostic** (Chapter 4) to force the customer to define the financial impact.

CRAFT Stage	Action Required	Artifact (Proof to Advance)	MEDDPICC Alignment
F: Find the Value/Pain (Chapter 4)	Execute MINE-based questioning to quantify the negative consequence and required outcome.	The Value/Pain Dossier (Quantified): Documented, customer-agreed cost of the problem (e.g., "-500K in annual loss") and the required quantifiable outcome (e.g., "Must reduce X by 15%").	M - Metrics (Quantified cost of pain is established and agreed). P - Pain (Acute, verified, and quantified).

2. Advancing to Proposal/Negotiation (SFDC 70%)

The deal is now a defined project. The probability moves to 70% only when the operator secures consensus on the **rules of engagement** for the evaluation phase. This is where you neutralize **Saboteurs** and secure **Guardian** alignment early.

- **Operator's Philosophy:** You never start a proof-of-concept (POC) or detailed evaluation without a **mutually agreed-upon rulebook**. This prevents the goalposts from moving later.
- **Mandatory Intelligence:** The operator must secure alignment across all key stakeholders regarding the rules of validation.

CRAFT Stage	Action Required	Artifact (Proof to Advance)	MEDDPICC Alignment
T: Tailor & Validate (Part 1) (Chapter 5)	Secure explicit, documented agreement on the terms of the solution evaluation.	Validation Charter & Success Metrics: A document reviewed by the Champion and Guardian detailing the Mutually Agreed-Upon Success Metrics and the technical/functional Decision Criteria (Chapter 5, Element 1).	D - Decision Criteria (Formal requirements and validation rules are locked down).

The final stages of the forecast require discipline and focus on contractual and executive commitments. We will now define the final mandatory artifacts needed to advance the deal to **Final Commit** and **Closed Won**.

Part C: Securing the Economic Buyer and Final Commitment (SFDC Stages 80% to Closed Won)

This final phase of the forecast is dedicated to eliminating the final 30% of risk—the political and legal hurdles. Your commitment level is based entirely on securing the **Economic Buyer (EB)** and validating the outcome of the **Decision Process**.

1. Advancing to Final Commit (SFDC 80%)

A deal is moved to **80% Probability (Final Commit)** only after the **Champion** has successfully defended the solution internally and secured the EB's preliminary approval, following a successful validation period.

- **Operator's Philosophy:** You never forecast a deal at 80% based on a verbal "yes" from the Champion. You must have **EB verification** and **Guardian approval** of the core solution metrics.
- **Mandatory Intelligence:** The operator must prove that the solution met the **Decision Criteria** agreed upon in the Validation Charter, and the EB is ready to proceed to contract.

CRAFT Stage	Action Required	Artifact (Proof to Advance)	MEDDPICC Alignment
T: Tailor & Validate (Part 2) (Chapter 5)	Secure final internal buy-in based on proof of performance against agreed metrics.	Successful Validation Report: Internal document confirming the solution successfully met all Decision Criteria outlined in the Validation Charter. Must include sign-off from the relevant Guardian (e.g., IT Security approval, Finance verification of ROI).	D - Decision Criteria (Criteria successfully met).
T: Tailor & Validate (Part 3) (Chapter 5)	Finalize the proposal and gain explicit confirmation of budget and authority from the top.	EB Confirmation Artifact: Direct confirmation (email or verbal transcript) from the Economic Buyer that budget is allocated, the Decision Process timeline is set, and the Champion has their full backing to move to contract.	E - Economic Buyer (EB is secured).

2. Advancing to Closed Won (SFDC 90% - 100%)

The final stage is purely about **Contractual Control** and ensuring the formal process moves efficiently. Risk here is related to unforeseen legal or procurement friction.

- **Operator's Philosophy:** The deal is not closed until the paper is signed. Your focus is on maintaining momentum and eliminating the final procedural hurdles (**P - Paper Process**).
- **Mandatory Intelligence:** The operator must have physical or verifiable digital proof of the transaction completion.

CRAFT Stage	Action Required	Artifact (Proof to Advance)	MEDDPICC Alignment
Commitment (Chapter 6)	Manage the negotiation and paper process, using the Champion to eliminate legal/procurement friction.	Final SOW/MSA in Customer Legal Review: The complete and final Statement of Work (SOW) has been issued and is in the customer's legal/procurement hands for final signature, with no outstanding business issues.	P - Paper Process (Final contractual documents are issued and under review).
Commitment (Chapter 6)	Secure the final signature.	Signed Contract (Closed Won): Verifiable proof of execution (Digital Signature or Hard Copy).	Closed Won

The Forecast Commitment Scale: Commit vs. Best Case

Forecasting requires honest assessment based on *current artifacts*, not *optimism*. The operator uses this scale to determine the true health of the deal in the final stages.

Forecast Status	Probability	Criteria for Placement (Artifacts Required)
Pipeline	-10-50%-	Deal is still missing quantified pain (M) or an agreed-upon validation plan (D).
Best Case	-70%-	Validation Charter is secured (70% Artifact met). OR The Final Proposal has been delivered, but the EB Confirmation is still missing.
Commit	-80%-	ALL artifacts for the 80% stage are met: Successful Validation Report is complete, and EB Confirmation Artifact is secured. The only remaining risk is the contractual process.

Operator's Rule on "Best Case": A deal should only be marked "Best Case" if the **70% Artifact (Validation Charter)** is secured, but the subsequent **80% Artifact (EB Confirmation)** is missing. **"Best Case" status is a temporary bridge, not a permanent home for deals.**

Part D: The Master Forecast Roadmap (SFDC Stage Gates)

Accurate forecasting is about verifying a **customer-controlled artifact** that proves momentum has moved from *your* hands to *theirs*. This roadmap outlines the required intelligence to confidently advance a deal through the standard Salesforce (SFDC) stages.

The CRAFT Intelligence Forecast Roadmap

CRAFT Stage	Action Required	Required Artifact (Verifiable Gate)	SFDC Stage Advancement	Forecast Status
C: Research (Ch. 1)	Execute FLOW Scorecard (Ch. 1).	Tier One Target Dossier: Weighted FLOW Score of 19-24. Must confirm Executive Mandate (Force) or Critical Deadline (Window).	0. Prospecting - 1. Qualified	Pipeline
R: Refine (Ch. 2)	Map the human terrain (Ch. 2).	Hypothesized Influence Map: Naming of the likely Operator (EB/Champion) and Guardian persona.	1. Qualified 2. Needs Analysis	Pipeline
A: Activate (Ch. 3)	Secure access and set the frame (Ch. 3).	The Mission Acceptance: Meeting secured with the Operator and the 90-Second Takeover successfully executed to set the next step.	2. Needs Analysis 3. Value/Pain Confirmed	Pipeline
F: Find Pain (Ch. 4)	Quantify the pain and secure the MINE driver (Ch. 4).	The Value/Pain Dossier (Quantified): Customer-agreed cost of the problem and the required quantifiable outcome (M - Metrics).	3. Value/Pain Confirmed 4. Solution Development	Pipeline (Max)

T: Tailor (Part 1) (Ch. 5)	Secure evaluation criteria consensus.	Validation Charter: Mutually Agreed Metrics, Decision Criteria, and validation plan locked down.	4. Solution Dev 5. Proposal/Negotiation	Best Case
T: Tailor (Part 2) (Ch. 5)	Prove value and secure executive authority.	Successful Validation Report & EB Confirmation Artifact: Guardian sign-off and EB's direct verbal/written commitment to proceed to contract.	5. Proposal/Negotiation 6. Closed Won	Commit
Commitment (Ch. 6)	Manage the final paper process.	Signed SOW/MSA: Verifiable proof of execution.	Closed Won	Closed Won

The Forecast Commitment Scale: Commit vs. Best Case

Forecasting requires strict discipline. Deals are not advanced based on *hope* or *opinion* ("They liked the demo"); they are advanced only when the mandatory **Artifact** is completed and verified.

Forecast Status	Probability	Criteria for Placement (Artifacts Required)	Rationale
Pipeline	-10-50%-	Deal is missing the Validation Charter (70% Artifact). It has an unquantified plan or is still mapping the process.	Action: Focus on achieving Quantification (50%) by securing the Value/Pain Dossier.
Best Case	-70%-	The Validation Charter (Metrics/Decision Criteria) is complete. The Solution is Designed, and the proposal has been delivered. BUT the final EB Confirmation is still missing.	Action: Focus is securing EB Confirmation and the Guardian's final sign-off to move to Commit.
Commit	-80%-	ALL artifacts for the 80% stage are met: Successful Validation Report is complete, and EB Confirmation Artifact is secured. The only remaining risk is the contractual process.	Action: Focus is on expediting legal/procurement and securing the Signed SOW (Closed Won).

The Operator's Rule on "Commit": Never mark a deal as **Commit** unless you have achieved the 80% artifacts, confirming the **Economic Buyer** has explicitly verified the budget and the solution has successfully passed the **Guardian's** inspection (D - Decision Criteria met). Anything less is a hallucination.

VIII. AI-Augmented Tradecraft: Your 24/7 Intelligence Analyst

The most time-consuming part of the CRAFT methodology—meticulous **Conduct Research** and **Refine & Target**—can now be executed in minutes, not hours. Large Language Models (LLMs) and generative AI, used with proper discipline and precise prompting, act as a tireless **24/7 Intelligence Analyst**, instantly synthesizing thousands of public documents (OSINT) to surface the high-leverage signals you need to score your targets.

The key is to treat the LLM as a highly capable, but literal, analyst. You must provide a clear **System Instruction** (the persona/goal) and a highly structured **Output Request** (the artifact).

Part A: AI for Conduct Research (C) – Automating the FLOW Score

The objective is to feed the LLM criteria from the **FLOW Scorecard** (Chapter 1) and ask it to find verifiable evidence (Level 1/2 Signals) to justify a Tier One ranking.

1. Prompt for Finding Executive Mandate (F - Force Score)

This prompt hunts for the Level 1 Power Signal needed to justify the x3 weighting for **Force**.

LLM Instruction Element	Prompt Template	Goal
System Instruction	Act as a strategic financial analyst specializing in identifying market volatility risks and strategic pivots.	Sets the tone and filter for analysis.
User Query	Analyze the last two quarterly earnings call transcripts and investor day presentations for [Target Company Name]. Identify any statements or executive language that signals a new, funded, strategic initiative related to [Your Core Problem Area, e.g., cloud cost reduction or cyber resilience upgrade].	Directs the search to high-value sources.
Output Request	Extract the initiative name, the name/title of the sponsoring executive, and the quote or metric that confirms budget or urgency (e.g., "committed \$15M," "board priority"). If none exist, state "No Level 1 Power Signal detected."	Provides the Artifact needed for the FLOW Score.

2. Prompt for Quantifying Obsession (O - Obsession Score)

This prompt helps quantify the urgency and resource commitment, needed for the **Obsession** score, by analyzing hiring patterns.

LLM Instruction Element	Prompt Template	Goal
System Instruction	Act as a talent acquisition analyst determining where a company is investing new political and financial capital for a transformation.	Focuses on resource allocation.
User Query	Scan job postings and recent LinkedIn activity for [Target Company Name] over the last 6 months. Identify the number of Director, VP, or C-level roles being actively recruited to solve challenges in the [Your Core Problem Area, e.g., data privacy or supply chain optimization].	Hunts for senior-level staffing signals.
Output Request	Provide the titles, a one-line summary of the core responsibility, and the total count. If the count is 3 or more, state "Obsession Confirmed."	Automates the Obsession score justification.

Part B: AI for Refine & Target (R) – Mapping the 7 Power Profiles

The objective is to map the human terrain (Chapter 2) before contact by analyzing bios and news to hypothesize **who is who** in the deal's power structure.

1. Prompt for Identifying the Guardian (Risk Profile)

The Guardian is the most likely source of a "No." This prompt helps identify them and their likely objection **before** the meeting.

LLM Instruction Element	Prompt Template	Goal
System Instruction	Act as a security consultant assessing political risks associated with a new technology implementation.	Sets the persona to focus on risk and control.
User Query	Analyze the public bios and recent news articles for the CISO, CIO, and General Counsel at [Target Company Name]. Synthesize their primary professional focus (e.g., "compliance," "cost control," "zero trust architecture").	Focuses on the C-suite roles that block deals.
Output Request	Identify the individual who is most likely to raise objections related to [Your Solution's Key Challenge, e.g., cloud integration or data movement]. Provide their name, title, and their most likely Guardian Objection (e.g., "Too much data exposure," "Vendor not FedRAMP certified").	Provides the necessary prep for Objection Handling.

2. Prompt for Predicting MINE Drivers (Finding Leverage)

This prompt synthesizes public data to help predict the **MINE Drivers** for your target Operator, allowing you to tailor your opening gambit (Chapter 3) to their personal agenda.

LLM Instruction Element	Prompt Template	Goal
System Instruction	Act as an executive coach analyzing career incentives and political pressures based on public performance and company strategy.	Focuses on personal motivation.
User Query	Based on the bios and the Level 1 Power Signal you previously identified for [Target Operator Name/Title] at [Company], which of the four MINE drivers (Money, Ideology, Necessity, Ego) is their primary motivation for leading this initiative?	Connects the person to the overall strategy.
Output Request	Identify the primary MINE driver and provide a one-sentence reason supported by a quote or documented initiative. Frame the reason in terms of their personal consequence (e.g., "Ego: They will be promoted if this project hits its aggressive deadline.").	Gives the operator the leverage to tailor the message.

Part C: The AI Tradecraft Discipline

- **Garbage In, Garbage Out:** The AI is only as good as the data it accesses. Always use search-grounded LLMs and verify critical findings (especially financial data) against primary sources.
- **AI for Synthesis, Human for Strategy:** The AI surfaces the *signals*; the operator must interpret them to build the *strategy*. Use AI to generate the artifact, but never let it define your next move without human oversight.

IX. The CRAFT Leader's Playbook: Scaling the Artifact Forecast

The ultimate test of the CRAFT methodology is not whether an individual can close a single deal, but whether a **leader can scale the discipline** across an entire team. Forecasting based on artifacts (Section VII) requires shifting your team's mindset from reporting *activity* to proving *intelligence*. This playbook provides the framework for coaching, managing, and measuring that shift.

Part A: The Forecast Discipline (Leading with Artifacts)

A CRAFT-driven forecast call is not a status update; it is an **Intelligence Briefing**. The leader must enforce a rigid discipline: a deal cannot advance to the next SFDC stage unless the corresponding **Artifact** is present and verified.

1. The Manager's Forecasting Oath

- **Never Accept Opinions:** Do not accept statements like "They really like the solution" or "It's going well." Always respond with: *"What is the verifiable Artifact (proof) that confirms that statement?"*
- **Enforce the FLOW Score:** The leader must routinely audit the pipeline for **Tier Three (0-12)** deals and enforce immediate purge actions. If the deal scores below 13, it must be removed to protect the team's time and focus.
- **Challenge the Champion:** The leader's primary forecast question at the 50-70% stages is not "What is the next step?" but **"What is the Champion risking?"** If the Champion risks nothing (Ego/Necessity MINE driver is low), the deal is not real.

2. The Artifact-Driven Forecast Call Structure

The forecast call must be run like a mission-planning session, not a deal review.

Forecast Segment	Leader's Focus & Question	Artifact to Verify
Pipeline Health (C-R)	Disqualification: "Show me your newest Tier One targets. Why did the Tier Three deals get purged this week?"	FLOW Scorecard: Auditing for Tier Three enforcement and confirming Force/Window alignment on new deals.
Commit/Best Case (F-T)	Risk Mitigation: "What is the single greatest source of resistance right now (Guardian/Saboteur)? How was that objection neutralized in the Validation Report?"	Validation Charter: Confirming all Decision Criteria were met and the EB Confirmation Artifact is secured.

Closed Lost Review	Intelligence Capture: "What was the missing Artifact? Did we lose because of Product (L-Leverage failure) or Process (F/W-Force/Window failure)?"	Missing Artifact Analysis: Logging the specific Artifact that was missing (e.g., "M-Metrics were never quantified") for future coaching and AI model training.
---------------------------	---	--

Part B: The Coaching Framework (Teaching the CRAFT Mindset)

CRAFT requires coaching the operator's mindset—shifting from *reacting to the customer* to *shaping the environment*.

1. Coaching Principle: The Operator's Humility

Teach reps to use **humility** as a strategic weapon (Chapter 3). Humility is not weakness; it is the strategic lowering of defenses to gain access and trust.

- **Coaching Point:** When a rep gets blocked, coach them to send a **Humility Advantage** follow-up email, framing the rejection as a chance to learn from the customer's *superior insight*.
 - *Example Coach Prompt:* "Don't ask, 'Why didn't you respond?' Ask, 'Based on my research, I hypothesize the challenge is X. Did I completely miss the mark here, or is the reality Y? I value your insight.'"

2. Coaching Principle: Finding the MINE Driver

Coach reps to immediately connect the business problem to the *personal* consequence for the Operator. If the rep only knows the corporate problem, they do not have a deal.

- **Coaching Point:** Teach reps to ask a variation of the "**What would that mean for you personally?**" question (Chapter 4) in every MINE discussion.
 - *Example:* "The company will save \$500K (M-Money), but what does **[Champion Name]** do with that win? (E-Ego). Do they get a promotion, a larger team, or the resources to finally achieve their long-delayed **Ideology** initiative?"

Part C: Scaling Metrics and AI Integration

The leader must measure the adoption of the CRAFT process across the team to ensure sustainability and ROI on the methodology.

Metric	Calculation	CRAFT Success Indicator
--------	-------------	-------------------------

CRAFT Score Velocity	Average time in Needs Analysis stage (SFDC 20% to 50%).	Reduced Velocity: If deals linger here, the team is failing to execute Activate and Find the Value/Pain. They are stuck chasing symptoms, not consequences.
Artifact Completion Rate	Percentage of deals above 50% that have a Quantified Pain Artifact (M-Metrics) logged in the CRM.	Pipeline Integrity: If this rate is low, the team is lying to the forecast. The deals are being advanced based on optimism, not proof.
Tier Three Purge Rate	Percentage of deals added to pipeline that are purged within the first 30 days.	Discipline/Focus: A high purge rate is a good sign, showing the team is correctly applying the FLOW Score and eliminating low-probability targets quickly.
Win Rate by Score	Percentage of deals won that had an initial FLOW Score of 19-24.	ROI on Process: Confirms the methodology works. The win rate for Tier One targets should be significantly higher than for any other segment.

By managing the process, not the people, the CRAFT leader creates a culture of **intelligence, discipline, and predictability**. The individual operator focuses on the mission, and the leader focuses on the integrity of the map.