

CURRENT STATE

01

Current State is the verified reality of what's happening today, in their workflow, to their people, with defensible impact.

WHAT GREEN LOOKS LIKE

Green is a documented, validated narrative that holds up without you.

RED FLAGS (WHAT'S USUALLY HAPPENING)

- ☐ You're using a generic headline instead of a win story.
- ☐ You're hearing a trigger issue and jumping to solution.
- ☐ You have a problem statement without implications, or numbers without meaning.
- ☐ You only have one stakeholder's version of reality.
- ☐ Nothing is documented, so nothing is real.

THE 3 QUESTIONS TO ASK THIS WEEK

- ☐ Where exactly does this show up in the workflow, and who feels it first?
- ☐ What breaks downstream because of it, and what becomes unattainable?
- ☐ What is the measurable baseline today, and who else could validate it?

DOCUMENT THAT SHOULD EXIST

A one-page Current State document in their language, with implications and a baseline, that you can forward internally and that still makes sense without you.

COLOR CODE STANDARD

RED

Generic headline, no proof.

YELLOW

Partial truth, unvalidated assumptions.

GREEN

Documented, validated, defensible, shared across stakeholders.

THIS DEAL

Account _____ Stage _____ Color today _____

Evidence _____

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DESIRED FUTURE STATE

02

Desired Future State is a tangible picture of what "better" looks like in their environment, defined as clear needs and clear outcomes.

WHAT GREEN LOOKS LIKE

Green is a documented, validated Desired Future State that holds up without you. The needs are locked and shaped, the outcomes are specific, and stakeholders agree on what "good" looks like.

RED FLAGS (WHAT'S USUALLY HAPPENING)

- ☐ You're using a generic headline instead of a defined future.
- ☐ You're treating preferences as needs, and needs as outcomes.
- ☐ Your demo is a tour, not a decision tool.
- ☐ The criteria keep drifting because nothing is documented.
- ☐ One stakeholder is defining success for everyone.
- ☐ The buyer is "still comparing options" because the scoring model is vague.

THE 3 QUESTIONS TO ASK THIS WEEK

- ☐ What are the must-have needs versus nice-to-have needs, and why?
- ☐ If we solve this the right way, what changes in workflow, behavior, and results?
- ☐ How will you compare options, who will score it, and what outcome defines success?

DOCUMENT THAT SHOULD EXIST

A one-page Desired Future State document, in their language, that includes locked solution needs, defined outcomes, and a simple way to evaluate options, something you can forward internally and that still makes sense without you.

COLOR CODE STANDARD

RED

Generic headline, no defined needs or outcomes.

YELLOW

Sound bites and preferences, criteria not locked or documented.

GREEN

Documented, validated, needs are shaped and aligned, outcomes are clear and shared across stakeholders.

THIS DEAL

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CHANGE JUSTIFICATION

03

Change Justification is the reason they'll prioritize change now vs. later vs. never, in a way an executive would defend.

WHAT GREEN LOOKS LIKE

Green is a documented, validated narrative that turns facts into a decision. It connects Pain, Gain, Priority, and Value Realization, and makes the cost of waiting obvious.

RED FLAGS (WHAT'S USUALLY HAPPENING)

- ☐ You're collecting facts but not creating a decision narrative.
- ☐ You have pain, but you can't tie it to executive priorities.
- ☐ You have numbers, but no story anyone would repeat.
- ☐ Your justification sounds reusable, which means it's marketing.
- ☐ The deal feels like a "nice to have" and the timeline keeps drifting.
- ☐ You're selling soft benefits without translating them into hard outcomes.

THE 3 QUESTIONS TO ASK THIS WEEK

- ☐ If we do nothing for 90 days, what gets worse, and what does that cost in dollars, time, or risk?
- ☐ Which executive priority does this attach to, and who will confirm that's true?
- ☐ How do we make the reason to change portable, and who do we need to get it in front of for challenge and agreement?

DOCUMENT THAT SHOULD EXIST

A one-page Change Justification business case document, in their language, that connects current pain to future outcomes, ties it to executive priority, quantifies cost of delay, and outlines how value will be realized, something you can forward internally and that still makes sense without you.

COLOR CODE STANDARD

RED

No defensible reason to act now, facts without a decision narrative.

YELLOW

Pain and outcomes are real, but priority, cost of delay, or executive alignment isn't confirmed or documented.

GREEN

Documented, validated narrative, priorities confirmed, cost of delay explicit, decision and timeline tied to a real business event.

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STAKEHOLDERS

04

Stakeholders are all the needed buying and influence centers to create a change-based decision.

WHAT GREEN LOOKS LIKE

Green is a documented, validated stakeholder coalition. You're not just org-charting roles and titles, you've collected the details each group unlocks and used it to mobilize the people who can sponsor, fund, and defend the decision.

RED FLAGS (WHAT'S USUALLY HAPPENING)

- ☐ You're stuck low in one function, hearing pain but never moving the story up.
- ☐ You went high too early with generic headlines and got dismissed.
- ☐ You have a "coach" who's friendly but won't get you to power.
- ☐ You haven't spoken to end users, so the truth is abstract.
- ☐ Technical buyers are shaping criteria without you.
- ☐ You don't have an executive sponsor, so the deal isn't protected.
- ☐ You don't have a verified economic buyer path, so money will move late or not at all.

THE 3 QUESTIONS TO ASK THIS WEEK

- ☐ Which stakeholder group is still locked, and what does it unlock in this deal?
- ☐ What is the story from the field that makes this problem unignorable, and who will validate it?
- ☐ Who will sponsor this change at the top, who can allocate the budget, and what's the path to both?

DOCUMENT THAT SHOULD EXIST

An org chart stakeholder map that lists the roles, names, influence, motivation, current sentiment, and your plan to engage each group, plus the field-to-middle-to-top path that gets you to an executive sponsor and a verified economic buyer.

COLOR CODE STANDARD

RED

You don't know the full cast or the path to sponsorship and budget.

YELLOW

You have names and meetings, but roles aren't verified, support isn't proven, and the story isn't traveling.

GREEN

Documented map, end-user truth captured, champion and executive sponsor are real and active, and the economic buyer path is verified.

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BUYING PROCESS

05

Buying Process is the real path from interest to signature. It includes the business decision steps and the legal and commercial execution steps, with gates, owners, timelines, approvals, and compelling events.

WHAT GREEN LOOKS LIKE

Green is a co-created, documented plan that holds up without you. Both lanes are mapped, with owners and dates, a confirmed compelling event, confirmed signature authority, and weekly tracking against completed actions.

RED FLAGS (WHAT'S USUALLY HAPPENING)

- ☐ You're forecasting business intent instead of operational reality.
- ☐ "We're ready" is being treated like "We're signing."
- ☐ Legal, procurement, security, onboarding, or signature authority are a black box.
- ☐ Timelines exist as verbal estimates; nothing is documented or co-created.
- ☐ There's no compelling event, so dates are optional.
- ☐ Activity is high, but actions that move milestones forward aren't completing.

THE 3 QUESTIONS TO ASK THIS WEEK

- ☐ What does the business and legal process look like?
- ☐ What surprises often come up at the last minute that we should get ahead of?
- ☐ Ideally, when would you want this solution live? Can we work backwards on the milestones to get there?

DOCUMENT THAT SHOULD EXIST

A Mutual Action Plan that includes both the business decision process and the legal and commercial execution process, with milestones, next actions, owners, and completion dates.

COLOR CODE STANDARD

RED

You don't know the steps, owners, documents, cycle times, or compelling event in either lane.

YELLOW

You have a rough idea or verbal agreement, but it's not documented, co-created, tracked, or it's slipping without a recovery plan.

GREEN

Co-created MAP, both lanes mapped, owners and dates confirmed, compelling event and signature authority confirmed, and progress tracked by completed actions.

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COMPETITION

06

Competition is every force impacting change now with you, including status quo, internal build, named competitors, and competition for resources and priority.

WHAT GREEN LOOKS LIKE

Green is when competition is visible and managed. You can name the real alternatives, you understand why each one could win, you've shaped the decision criteria toward your differentiation, and you have a proof plan that makes you the least risky path.

RED FLAGS (WHAT'S USUALLY HAPPENING)

- ☐ You're treating competition like an event instead of a constant force.
- ☐ You can't name the real alternatives, especially status quo and internal build.
- ☐ You're leading with Why Us before winning Why Change, so you lose to "not a priority."
- ☐ The buyer is defining generic criteria without you, so everyone looks the same.
- ☐ You're reactive, pitching differentiators only after a competitor shows up.
- ☐ Contrast is weak, so the buyer defaults to the cheapest option.

THE 3 QUESTIONS TO ASK THIS WEEK

- ☐ When you are comparing options, what are the three things that will weigh heaviest on your decision? How do we rank on those?
- ☐ If you were to solve this problem in a different way, what would that be?
- ☐ What can we do to help the team feel comfortable moving forward with us?

DOCUMENT THAT SHOULD EXIST

A one-page competitive strategy document that lists the real alternatives, what each option is optimized for, the buyer's decision criteria, where you're differentiated and vulnerable, and your proof plan to win, something you can forward internally and that still makes sense without you.

COLOR CODE STANDARD

RED

You can't name the real alternatives or why they might win.

YELLOW

You know the competitors, but criteria isn't shaped, differentiators aren't agreed, or proof isn't planned and validated.

GREEN

Alternatives are named, criteria is shaped toward your strengths, differentiation is agreed, and the status quo is displaced.

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