

FIELD EDITION · FOR SDRS & AES

You're not losing to better reps. *You're losing to reps* who know the buyer.

Here's how to close that gap before you dial. The difference between your top rep and everyone else isn't talent. It's what they know about the specific buyer before the call starts. This is the prep process that builds that knowledge. Every time.

BEFORE PREP · STOP SELLING TO A JOB TITLE

The Title Trap

"Director of InfoSec" describes a demographic, not a person. The Director of InfoSec at a 60-person fintech and the one at a 4,000-person regional bank share a title and almost nothing else. You're not calling the title. Stop preparing for it.

The Shared Template Lie

A template written for an average buyer is written for no specific buyer. When your personalization is a mail merge field, the buyer feels it in the first thirty seconds. They stay polite. They stay surface-level. They give you just enough to keep the call moving.

The Gong Trap

Recordings show you what was said. They don't show you why it worked for that buyer's specific situation. Studying calls trains pattern-matching. Pattern-matching is not buyer intelligence. It's a faster way to run the same script.

THE STANDARD · No rep should dial a buyer they've only researched by title.

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STEPS 1 – 4 · THE 6-STEP BRIEF

Build the brief before you open the CRM.

01

OF 6

Map the Situation, Not the Role

Before any call, identify which variant of this buyer you're walking into: missed quota, just promoted, inheriting a broken team, or scaling fast from a recent hire surge. Same title. Completely different call. The situation is the starting point.

02

OF 6

Name the Failure They're Managing Around

Every buyer in a given role is managing around a specific failure mode they cannot afford to own this quarter. Surface it before the call and your questions land somewhere real. Miss it and you get polite answers to neutral topics.

03

OF 6

Know What They've Already Tried

Your buyer has already attempted something — a vendor they fired, an initiative that stalled, a process that almost worked. Knowing their prior attempts tells you which objections are loaded and which framings are already burned.

04

OF 6

Define Their Success Metric Before the Call

Reps who don't know the buyer's success metric pitch features. Reps who do know it connect every capability to an outcome the buyer is already accountable for. If you can't answer what their manager measures them on, you're not ready to pitch.

STEPS 5 – 6 · DURING THE CALL · AFTER THE CALL

The last two steps most reps skip to first.

05 Pre-Load the Objections

Map the two or three objections most common to this buyer's role and situation before you dial. When you can say 'I expected you might raise that' and mean it, no slide deck can fake that level of preparation.

OF 6

06 Write One Question That Proves You Did the Work

One sharp opening question tied to this buyer's specific situation signals more than five generic discovery questions. It tells the buyer you did something before this call that most reps don't bother doing. That's how you earn the conversation.

OF 6

DURING THE CALL · APPLY THE BRIEF

— Reference the Brief, Not the Feature List

Every question connects to what this buyer is trying to fix — not the product. If you're pitching capabilities before connecting to their context, stop.

— Watch for Situation Misreads

If their first answer doesn't fit your brief, adapt immediately. The brief is a starting point, not a script.

— Let the Objection Map Do the Work

'I expected you might raise that' earns more trust than any slide in your deck.

AFTER THE CALL · COACH ON CONTEXT, NOT DELIVERY

— Debrief on Context, Not Delivery

The question isn't 'how did they handle it?' — it's 'did they know this buyer's situation before they dialed?'

— Log the Situation Variant, Not Just the Stage

Stage-only CRM notes give the next rep nothing but a demographic assumption to sell from.

— Rotate Briefs Across the Team

One rep's brief for a buyer role is coaching material for every rep with that title in their pipeline.

THE ONE TEST YOU CANNOT CHEAT

Before any rep dials, they must answer both of these.

What is this specific buyer trying to avoid this quarter?

What have they already tried to solve it?

If they can't answer both from actual context — not a title assumption — prep isn't done.

This is the manual version. Buyer Intel Accelerator builds it automatically — situation, objection map, committee dynamics — for 74+ buyer personas. In under five minutes.

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