

Content Map: AI Sales Enablement Training

Company: Wayne IT Solutions (fictitious company)

Sample Topic

Choosing and recommending the right solution strategy (Tactical, Strategic, or Full-Scope) based on client readiness in IT sales.

I am the Subject Matter Expert (SME) for this project, drawing from my experience in instructional design and IT sales to develop realistic scenarios, accurate terminology, and performance-based objectives tailored to Wayne IT Solutions' sales environment.

Defined Business Goal and Problem

Business Context

Wayne IT Solutions is a fictional B2B technology consulting firm that specializes in cloud infrastructure, data integration, and digital transformation services. It operates in the information technology (IT) industry, serving mid-sized to enterprise-level clients across healthcare, logistics, and finance. The company offers both strategic consulting and implementation services, with a growing team of Account Executives responsible for qualifying client needs and recommending the appropriate solutions.

Business Goal

The business goal of this training is to accelerate deal velocity and increase close rates by enabling Account Executives at Wayne IT Solutions to consistently recommend solution strategies that align with client urgency, budget, and readiness.

This outcome directly supports the company's broader strategic goal: to close more deals, faster, while building greater trust with enterprise clients. The training is designed to fully meet this goal by equipping AEs to:

- Select the right-sized solution (tactical, strategic, or full-scope)
- Align recommendations with buyer readiness and budget
- Identify urgency signals during discovery
- Reduce misalignment that leads to stalled or lost deals

What success looks like (with metrics):

- 20% reduction in average deal cycle time within two quarters
- 15% increase in closed-won rate for deals under \$50K
- 50% decrease in stalled proposal rate
- 90%+ positive feedback from client post-discovery surveys

This training is strategically aligned to drive measurable impact on sales velocity and win rates by solving the root causes of misaligned solution recommendations.

Business Problem

Account Executives at Wayne IT Solutions frequently recommend full-scope solutions by default, even when a tactical or phased approach would better match the client's budget, urgency, and timeline. This misalignment causes unnecessary complexity, slows down the sales process, and often leads to stalled deals.

Over the past two quarters, the following trends have highlighted this performance gap:

- Average deal cycle time increased from 32 to 45 days, particularly for smaller or mid-range accounts.
- Stalled deal rate rose by 22%, with internal reviews citing scope misalignment as a contributing factor.
- Closed-won rate dropped from 54% to 43% for deals under \$50K, which should typically close quickly with lighter solutions.
- Post-discovery client satisfaction ratings dropped from 4.3 to 3.7 (out of 5), often linked to unclear or overwhelming proposals.

Many AEs — particularly those new to the role or transitioning from SDR and support backgrounds — are not consistently validating client budget, timeline, or decision-making readiness. Without those insights, they default to recommending full-scale solutions, which may not match the client's current stage or needs.

This training addresses the root causes of this performance gap by building the confidence and skills AEs need to validate scope, select the right solution type, and present tailored, goal-aligned recommendations — ultimately helping Wayne IT Solutions meet its business goal of shorter sales cycles and increased win rates.

Audience

Primary Learners

New and transitioning Account Executives (AEs) at Wayne IT Solutions, primarily hired from adjacent roles such as Sales Development Representatives (SDRs), tech support specialists, or customer success managers. Most have limited formal sales training and are still building confidence in consultative selling and scope alignment.

Demographics

- Age range: 24–38
- Locations: Houston (TX), Atlanta (GA), Columbus (OH), and Seattle (WA)
- Education: Typically hold associate's or bachelor's degrees in business, marketing, computer science, or IT-related fields

Prior Knowledge / Skill Level

Most learners have basic familiarity with Wayne IT Solutions' services and client engagement through prior roles as SDRs, support reps, or success managers. They are comfortable with CRM tools (e.g., HubSpot or Salesforce), know the sales pipeline stages, and can speak to general solution categories (cloud, security, integration).

However, they lack depth in consultative discovery, deal scope validation, and solution strategy alignment. Many have not previously been responsible for tailoring proposals based on client readiness, and few have formal training in identifying when to recommend tactical versus strategic solutions. Their skill level is intermediate in client communication, but novice when it comes to sales decision-making and framing recommendations that accelerate deal velocity.

Current State

Before taking this training, Account Executives at Wayne IT Solutions are:

- Defaulting to full-scope proposals (enterprise-wide solutions) in over 70% of deals, even when client readiness indicates a smaller tactical solution is more appropriate
- Missing key discovery signals in at least 40% of initial calls, based on internal call reviews
- Experiencing longer average deal cycles, which have increased from 32 to 45 days in the past two quarters

- Closing fewer mid-range deals (< \$50K) — win rate has dropped from 54% to 43%
- Losing momentum mid-deal — with a 22% increase in stalled opportunities, often due to unclear scope
- Failing to ask validation questions around budget, timeline, and authority in over 50% of active deals
- Receiving lower satisfaction ratings on post-discovery client surveys, falling from 4.3 to 3.7 out of 5

Future State

After completing the training, Account Executives will:

- Match solution type to client readiness in 90% of proposals, reducing scope misalignment
- Use scope validation questions consistently in at least 80% of discovery calls
- Shorten average deal cycle time from 45 days to under 36 days (20% reduction)
- Increase win rate for mid-size deals (< \$50K) from 43% back up to 55%+
- Reduce stalled deals by 50%, by avoiding overbuilt or unclear proposals
- Improve client satisfaction scores on discovery/proposal experience from 3.7 to 4.5+ out of 5
- Tailor proposals more effectively, resulting in fewer internal revision requests and faster deal approvals

These results will help Wayne IT Solutions close more deals faster, especially in the high-volume mid-market segment, while improving client trust and retention.

Content Outline

Actions Needed to Meet Goal

Action 1	Action 2	Action 3	Action 4
Identify solution types and when to use them.	Validate (confirm goals, uncover needs, clarify timeline and budget) client goals and scope before making solution recommendations.	Present goal-aligned recommendations using the appropriate solution type.	Recommend right-sized solutions that align with the client's urgency, budget, and readiness.

How Each Action Ties to the Business Goal

Action 1	Action 2	Action 3	Action 4
By tailoring recommendations to the buyer's situation, AEs avoid delays caused by over- or under-selling. This directly contributes to shorter average deal cycles and a higher close rate — key metrics for Wayne IT Solutions.	When AEs validate the client's goals and scope early in the conversation, they prevent misaligned proposals, reduce rework, and accelerate decision-making — contributing to faster close rates and higher client satisfaction.	Present goal-aligned recommendations using the appropriate solution type.	Clear, tailored recommendations aligned with client needs and readiness reduce back-and-forth, build trust, and accelerate the deal cycle — supporting faster closes.

Learning Objectives

Terminal Learning Objectives

Terminal LO 1	Terminal LO 2	Terminal LO 3	Terminal LO 4
Recommend a solution strategy based on client urgency, budget, and deal stage.	Validate the client's goals, needs, and scope to determine solution fit.	Present a solution strategy that aligns to client goals, urgency, and budget using the appropriate solution type.	Deliver a solution recommendation that aligns with client urgency, goals, and budget.

Enabling Learning Objectives

Supports Terminal LO 1	Supports Terminal LO 2	Supports Terminal LO 3	Supports Terminal LO 4
- Identify client urgency indicators - Interpret budget alignment patterns - Define deal stage behaviors	- Identify the core components of scope: goals, problem, options, timeline, and budget - Ask open-ended questions to uncover business needs - Confirm understanding of client goals and clarify scope gaps before recommending a solution	- Identify client urgency, budget constraints, and readiness cues - Match solution types (tactical, strategic, full-scope) to client context	- Define tactical, strategic, and full-scope solution strategies - Identify client signals that indicate urgency, readiness, and budget comfort - Explain how solution size can impact deal momentum and close rate - Summarize key details to include in a tailored proposal - Explain how to align solution type with urgency, budget, and timing

Subtopics

Subtopic 1	Subtopic 2	Subtopic 3	Subtopic 4
Deal Context Clues	Scope Validation Process	Crafting a Goal-Aligned Recommendation	Tailoring Solutions to Fit Buyer Context

Subtopic Content Detail

Deal Context Clues	Scope Validation Process	Crafting a Goal-Aligned Recommendation	Tailoring Solutions to Fit Buyer Context
Urgency indicators: tight timelines, production outages, board deadlines	The five parts of scope validation: (1) Problem or goal, (2) Options being considered, (3) Timeline expectations, (4)	Use validated client inputs to shape the proposal narrative	Solution types defined — Tactical: targeted fixes with fast ROI, ideal for limited budgets and urgent needs. Strategic:

- Budget red flags: client stalls on pricing, limited scope approvals, discounts requested early - Deal stage clues — Early: general questions; Mid: specific comparisons; Late: legal or procurement loop-in	Budget available, (5) What success looks like - Use of open-ended discovery questions to clarify gaps - Use micro-commitments (e.g., "Let's align on this before we move forward") to keep the client engaged - Examples of validating vs. skipping scope	- Highlight which client goals are addressed by the proposed solution - Frame the recommendation in the client's language (goals, timeline, priorities) - Include solution rationale: why this solution fits now - Use framing phrases: "Based on your timeline and budget, the tactical option makes sense..." / "Since you're planning for a full-scale rollout, this strategic approach offers long-term support."	mid-sized, scalable packages for growing businesses. Full-scope: comprehensive transformation plans for long-term infrastructure overhaul. - Urgency signals: needs immediate resolution (e.g., "This must be solved this quarter"); business disruption (e.g., app outages, bottlenecks, employee frustration) - Budget signals: "Our CFO will need to approve anything over X"; asking for phased rollouts, MVPs, or cost comparisons - Readiness indicators: decision-maker is present and engaged; clear understanding of goals and timeline - Best practices: match language and scope to the prospect's urgency level; avoid pushing full-scope if the timeline or budget doesn't support it; use visuals to differentiate tiers (e.g., side-by-side comparison of solution paths)
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Assessment

Question 1 — Identifying Deal Stage and Solution Strategy

Scenario:

A mid-sized healthcare client is experiencing frequent system slowdowns that are disrupting their team's daily operations. During discovery, the client emphasized their need for immediate relief within the next 90 days and disclosed a limited short-term budget. While open to long-term improvements, they stressed that current performance and stability are their top priorities. Based on the client's stated needs, what solution strategy should you recommend?

Correct Response:

This client's tight timeline and limited budget signal a need for a tactical solution that provides short-term stability.

Distractors:

- Full-scope solution that includes roadmap planning, system redesign, and infrastructure migration.
- Strategic solution that spans 12–18 months and includes layered implementation.

- Wait to recommend any solution until the client expands their budget.

Feedback:

Correct — You correctly identified the client's urgency (tight 90-day timeline) and budget limitations as key deal context clues that point to a tactical solution — one that delivers immediate value without exceeding scope. This is essential to accelerating deal velocity and building trust early in the sales cycle.

Incorrect — This response doesn't align with the client's situation. The scenario includes clear urgency and budget clues — signals that a tactical, short-term solution is most appropriate. Over-engineering or delaying a recommendation can lead to lost trust and stalled deals. A strong AE adjusts their recommendation based on context, not just long-term goals.

Question 2 — Validating Client Goals Before Recommending

Scenario:

You're speaking with Terrell, an operations manager for a logistics company. He says they're "trying to modernize" and "need help streamlining workflow," but doesn't share many details. Which response best validates the client's goals before recommending a solution?

Correct Response:

"Can you walk me through what a streamlined workflow looks like for your team?"

Distractors:

- "Great, I'll send over some options that help with workflow automation."
- "Would you like to see a full-scope demo of our platform?"
- "Sounds good — how soon are you looking to launch something?"

Feedback:

Correct — This question invites the client to define success in their own words, which helps you uncover their specific goals, pain points, and priorities — all essential to properly validating scope before recommending a solution.

Incorrect — Before offering a recommendation, you need to understand the client's definition of success. Asking open-ended, goal-focused questions helps uncover the details that drive the right-fit solution.

Question 3 — Framing a Goal-Aligned Recommendation

Scenario:

You're preparing a proposal recap email for Alex, a tech director at a mid-size firm. His team needs an immediate fix for endpoint security, but he also mentioned plans to upgrade broader systems in 6–12 months. Based on what he shared, which sentence best frames your recommendation?

Correct Response:

Based on your immediate need and short-term budget, a tactical endpoint security upgrade will provide the stability your team needs now — while keeping the door open for your long-term infrastructure goals.

Distractors:

- Recommend a full-scope solution that addresses future upgrades.
- Offer a strategic plan with long-term benefits and enterprise-level rollout.

- Refer them to a partner who handles complex deployments.

Feedback:

Correct — This answer uses the client's stated goals ("immediate need," "endpoint security"), timeline ("now," "6–12 months"), and budget awareness ("short-term budget"). It provides a solution rationale and uses appropriate framing language to position the proposal as both timely and strategic.

Incorrect — The best proposal language directly reflects what the client told you — their goals, urgency, and budget. Framing the solution using their own language builds trust and helps justify your recommendation.

Question 4 — Presenting a Tactical Recommendation

Scenario:

You're meeting with a new prospect who's frustrated by slow internal app performance. They've said their budget is tight and they want to see measurable improvements within the next 90 days. How should you present your recommendation?

Correct Response:

Recommend a tactical solution that targets the client's short-term priorities, like system performance or workflow bottlenecks. Ensure the plan aligns with the 90-day timeline and budget, while building trust and momentum for future stages.

Distractors:

- Recommend a full-scope strategy to overhaul infrastructure and software across departments.
- Present a strategic 12-month modernization plan to optimize all internal systems.
- Defer the proposal until internal stakeholders commit to a full discovery phase.

Feedback:

Correct — This response aligns perfectly with the scenario: a client needs quick, visible impact within a tight timeline and budget. The AE avoids overreaching with a strategic or full-scope proposal and instead provides a clear, actionable recommendation focused on fast ROI. This approach builds trust, keeps momentum, and meets client expectations — increasing the likelihood of a win.

Incorrect — Over-engineering or delaying a recommendation can lead to lost trust and stalled deals. A strong AE adjusts their recommendation based on context, not just long-term goals.

Question 5 — Recognizing a Late-Stage Deal

Scenario:

You've been working with a client for several weeks. They've approved the proposed pricing, and all questions about scope and implementation have been addressed. Now, the client says: "We've passed everything to legal and procurement for final review. Shouldn't be long now." You haven't heard from them in a few days, and no next steps are currently scheduled. Based on these deal clues, what should you do next?

Correct Response:

Recognize this as a late-stage deal. Lightly confirm next steps and timelines, while staying available and avoiding new changes to the proposal.

Distractors:

- Push for daily updates to speed up legal review.

- Add a new service option in case leadership wants more value.
- Stop outreach and wait for the client to respond.

Feedback:

Correct — Legal and procurement loop-in signals the deal is near close. The best move is to protect momentum by checking in without adding pressure or complexity.

Incorrect — Over-engaging, changing the scope, or going silent can all slow down a late-stage deal. At this point, your job is to support the close — not reopen discussion.