

MEDDDICC Sales Process Checklist

Your guide to better deal qualification



M

Metrics



E

Economic
Buyer



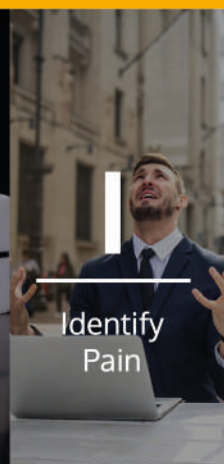
D

Decision
Criteria



D

Decision
Process



I

Identify
Pain



C

Champion



C

Competition








What is MEDDICC?

MEDDICC is a sales qualification methodology which stands for **Metrics, Economic Buyer, Decision Criteria, Decision Process, Identify Pain, Champion and Competition**.

There's no doubt, the MEDDICC sales methodology has helped many sales teams and sales reps around the globe achieve extraordinary results. Statistics show that **30%+ growth rates in saturated markets and 250%+ in start-ups** are possible. In fact, many sales reps that touch MEDDICC will never work without it again.

Fast-paced companies like Workiva, MongoDB, Alfresco, Snowflake and many more have built a healthy pipeline and forecast based on the fundamentals of MEDDICC.

I invite you to read on to get an overview of this simple and lightweight qualification process, so that you can **better qualify your deals and call them with confidence**. Read all the way to the end as we also share more on how you can easily implement [MEDDICC on Salesforce](#).

M	E	D	D	I	C	C
Metrics  Quantifiable & compelling benefits that underpin the business case & justify the investment.	Economic Buyer  The person who has the power to make decisions & authorize the spending.	Decision Criteria  Formal criteria used to compare vendors - technical requirements, vendor info & financial.	Decision Process  Events and timeline that go into validation & the people involved in the approval process.	Identify Pain  "Why" the prospect should act. The strength of the pain will determine the urgency.	Champion  Someone who has the power & influence to drive the deal & sell internally on your behalf.	Competition  A product you're competing with or your prospect's preference for the status quo.



Rizan Flenner
Founder & CEO, [iSEEit](#)

Being a seasoned sales professional, Rizan is well versed in the field of Enterprise Sales. Starting out as a Sales Rep and then working his way up to becoming a Sales Leader, he's had many opportunities to work for the world's most innovative companies who offer state-of-the-art software to clients such as **CA Technologies, Dynatrace, Mercury interactive, BMC, and MongoDB**.

While he's worked extensively with sales methodologies such as **MEDDICC, Spin Selling and Solution Selling**, they were not seamlessly integrated into CRM systems.

Finally in 2014, Rizan together with 2 other sales leaders set out to build their own tool for salespeople and founded iSEEit, which would enable Enterprise sales teams to **close their deals faster**.

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A collage of school supplies including a calculator, pencils, a magnifying glass, and a bar chart, with the word 'METRICS' overlaid in large white text. The background features a dark, textured surface with blue and white papers. A purple calculator is on the left, showing '100' on its display. Two pencils, one blue and one white, are in the center. A magnifying glass is on the right. A bar chart with green, orange, and blue bars is partially visible. Labels like 'Out02' and 'Out03' are on the chart. A legend on the right shows colored squares for 'S', 'Se', and 'Se'.

METRICS

Metrics

What are Metrics?

Metrics are **quantifiable** and **measurable** results that your potential customer will use to **justify their investment** in your solution. It feeds the business case and Return on Investment (ROI) that financial decision makers will use to base their decision upon. It can be divided in 2 major groups: *Below the Line* or *Above the line*.

Below the Line

Below the line metrics refers to **cost savings** and **efficiency gains**. Oftentimes, they are also associated with measurements in reductions on Full-Time Equivalent (FTEs).

Above the Line

Above the line metrics are more business-centric. Oftentimes, *above the line* metrics could refer to **increases in revenue or profit, quicker time to market, higher product quality and the level of customer satisfaction**. These metrics are used to make business decisionw and build Business Cases or Return on Investment (ROI).

What Do Strong Metrics Look Like?

Here's an example of what strong metrics could look like: At the moment, we have 15 FTE at 95% utilization. We are expanding our infrastructure by 15% a year and we expect another acquisition this year - which will double. We will not get a budget to increase FTEs.

Questions to Ask:

- How would we measure the **success** of our project?
- Which **metrics** around cost, efficiency or business do we need to achieve?
- How is **success measured** by the business?

NOTE: Collecting these metrics from your existing clients makes wonderful **proof points** on your discovery calls with prospects.

Related Article: More on Metrics

Click [here](#) or scan the QR code below to learn more about collecting the right metrics to build a compelling ROI.



Collecting Metrics is like collecting money. You either need them to justify the cost on your deal or win new clients.



ECONOMIC BUYER

Economic Buyer

Who is the Economic Buyer?

Economic Buyers (EB) are decision makers who give the **ultimate “yes” or “no” to a project**. This person usually has clear sight on the business benefits, decision criteria and the process to close a deal. The EB also usually has the **discretionary right to spend**. Therefore, depending on the size of your deal, you need to find the appropriate person.

Why You Must Meet the EB?

Meeting the **real** Economic Buyer, asking them for their sponsorship, what their decision criteria and next steps are usually shed a lot of light on the complex decision criteria and processes. **Preparing for the Economic Buyer meeting is key to succeeding**. However, you need to do your homework on the value proposition and earn the right to ask for this meeting.

Identifying the Real EB

Spending time to **qualify** and make sure you've spoken to the **real** Economic Buyer is key. A good qualifying question could be: *“If you and I come to an agreement, is there anybody else that we would need to involve or ask for approval formally or informally?”*

Questions to Ask:

- Do you **sponsor** the project?
- What does **success** look like for you?
- What are the **next steps** if we fulfil the criteria for success?

NOTE: If the Economic Buyer confirms the project and outlines a possible close date, your deals have a good chance of closing. If you do not meet the Economic Buyer and get their approval, your chances of closing a deal in time drops **below 50%**.

Related Article:

More on the Economic Buyer

Click [here](#) or scan the QR code below to learn more about how meeting the Economic Buyer can help you hit an **80% close rate**.



If you do not meet the Economic Buyer and get their approval, your chances of closing a deal in time drops below 50% .

A hand holding a pen is writing on a checklist in a notebook. The checklist has several items, some of which are marked with checkboxes. The background is a blurred image of a notebook page with a grid pattern.

DECISION CRITERIA

Decision Criteria

What is Decision Criteria?

Every project has a **formally** or **informally** defined Decision Criteria in which the solution has to fulfil before your prospect decides to move forward. Decision Criteria are often categorized further as *Technical, Business/Commercial and Legal* Decision Criteria.

Technical Decision Criteria

Technical Decision Criteria refers to the **feasibility** of your product or solution. These often explore questions such as “*Are the use cases covered by the potential solution?*” and “*Does it comply with existing infrastructure and if so, how well will it integrate?*”.

Business/Commercial Decision Criteria

The most common Business/Commercial Decision Criteria is **alignment to budget**. However, corporations are still very much only driven by **Return on Investment**. Sometimes, the investment needs to already be justified within a span of 12 months.

Furthermore, there are different types of budgets like *Capital Expenses (CAPEX)* or *Operating Expenses (OPEX)*. Some clients have huge OPEX reduction campaigns or have certain cash flow requirements that drive the Decision Criteria.

Legal Decision Criteria

This criteria is often vague and not formally defined. However, it is of utmost importance when closing large deals as it is built around the **trust and confidence** in you and your company to help your prospect succeed. The Legal Decision Criteria involve the **ease of doing business** and **acceptance of paperwork**. You must discover these criteria to make sure that all stakeholders have the answers that will **build trust and faith in you, your company and offering**.

Questions to Ask:

- What are the **Technical Decision Criteria** we need to fulfil for the client to make a decision?
- How do we calculate the **ROI** for this project to justify the investment?

NOTE: Showing thorough understanding and aligning yourself to your client's needs to establish a **good fit** will display great flexibility. This can influence their decision towards your offering.

Related Article: More on Decision Criteria

Click [here](#) or scan the QR code below to learn more about how you can influence your prospect's Decision Criteria in your favor.



If an important criteria that you serve is missing, challenge the client and showcase your knowledge based on your successful track record.

A row of white dominoes is arranged on a dark, reflective surface. The dominoes are slightly out of focus, creating a sense of depth. The text "DECISION PROCESS" is overlaid in large, bold, white capital letters, centered horizontally and partially obscuring the dominoes.

DECISION PROCESS

Decision Process

What is Decision Process?

While the Decision Criteria are all about what the decision is based upon, the Decision Process is about the **route** to it.

The Decision Process can be separated into:

- **Technical Decision Making:** The route to a technical decision
- **Business Decision Making:** The route to money
- **Paper Process:** The route to getting all the signatures needed

Technical Decision Making

Based on the Technical Decision Criteria, companies will set up formal or informal processes that lead to a technical decision. Hence, it's important to understand **what** these steps are and who is **involved** in it.

As with the Decision Criteria, the Technical Decision Process should also be documented and confirmed by the client.

Business Decision Making

The Business Decision Process refers to **who's** involved in the approval process and if there are any formal boards.

At this stage, you must **investigate** if there are formal procedures or paper processes involved in a workflow for a project approval and how long that would take.

Paper Process

The paper process is a rigorous, regulatory or business compliance need, which often leads to **time intensive negotiations**. Although this can take weeks or even months, having a legal agreement is absolutely necessary.

This process is the **No. 1 reason why contracts get postponed**, causing deals to slip out of the quarter. Make sure you have the executive sponsorship to negotiate with Purchasing and Legal. Always be paranoid about the details.

Questions to Ask:

- Which **personnel** are involved and what steps are needed to reach a decision?
- How can we put this in a sequential order and which **timeline** is it based on?
- What does the **approval process** look like for a deal worth \$100K, \$500K or \$1 million?
- **Paper process:** How is the legal construct set up? Are there frame agreements in place? What are the critical mandatory terms and conditions? Which contractual paperwork is the basis of negotiation?

Related Article: More on Decision Process

Click [here](#) or scan the QR code below to learn more about the 3 types of Decision Process and why you need to stay on top of it.



Be paranoid. Always plan for the worst and stay in control. Don't simply assume things will go well.

A man in a dark blue suit and white shirt is sitting at a table outdoors. He is looking upwards with his mouth open and his hands raised in a gesture of surprise or frustration. A silver laptop is open in front of him on the table. To the left of the laptop is a white disposable coffee cup with a black lid. The background shows a blurred city street with buildings and other people.

IDENTIFY PAIN

Identify Pain

What is a Strong Pain Point?

Identifying a strong pain point or an initiative of your prospect is one of the major qualifiers during the discovery phase and is **required in order to determine if you can convert your lead into an opportunity**.

A strong pain can be a **technical or a business shortage** that the client would like to overcome, stop or change.

The pain must be so strong that it impacts the customer's *time, cost, risk or revenue*, creating a **compelling event** for them to act upon. We refer to this as "the consequence of doing nothing when the compelling event occurs".

Example of a Strong Pain Point

ABC Soft needs to deliver a solution by the end of the year. They have **major delays** caused by serious bugs, which may **prevent on-time delivery**. There is a **penalty clause of \$100K per week** if the software is not up and running by January 1st.

In this case, the **pain point** is the serious bugs in the software which obstructs timely delivery. The pain is **strong** because for every week the software is down, ABC Soft would need to fork out \$100K, which is a very **high cost**. This can also hurt their reputation, causing them to **lose customers in the long run**. As a result, this pain point is strong and compelling enough for them to look for a solution immediately which can solve this problem at soonest.

Example of a Weak Pain Point

ABC Soft needs to conduct regression testing due to buggy software. Over here, the pain point is not apparent as there are vital pieces of information missing. There is no deadline and the consequences of not acting are **not clearly and explicitly outlined**. Hence, it is likely that looking for a solution is **not a top priority** for ABC Soft at this point.

Questions to Ask:

- **What is the pain point?** What exactly is causing the delays?
- **What is the implication?** How would the pain impact your company and what does it mean for you and the company?
- **Is it really compelling?** What are the consequences of doing nothing? Will it impact your business negatively?

NOTE: A **weak pain** or **unclear consequences** will usually cause delays or reduced budgets due to the lack of priority given by the executive management.

Related Article: More on Identifying Pain

Click [here](#) or scan the QR code below to learn more about how you can effectively identify the real pain points of your customers.



The pain must be so strong that it impacts the customer's time, cost, risk or revenue, creating a compelling event for them to act upon.



CHAMPION

Champion

Who is the Champion?

A Sales Champion is the person within your client's organization who will **sell on your behalf when you're not there**. They will guide you through the decision making process, introduce you to key players and decision makers, and alert you if things go wrong.

Together with identifying pain, finding your champion within your prospect's organization is also an important part of the discovery phase and is a huge indicator of whether your lead can become an opportunity.

Identifying Your Champion

Someone who will fight for you in your absence needs to have *power & influence* and a *personal interest* to solve the pain.

Power & Influence: This could manifest in the form of a **hierarchical position** or through **displaying expertise** in a domain. Even if they don't carry the official title held by management, they can be spotted as they are usually well received by their peers, are very influential and typically have a good track record of successful projects under their belt. This makes them very **visible along the chain of command**.

Personal Interest: While pain is an important driver of urgency, there is always an owner with a **personal interest to get this pain solved**. This personal interest is what drives this person to collaborate with peers, consultants and vendors to attack the pain as soon as possible, **speeding up** the buying process.

Once you've identified the goals of your potential Champion(s), you will be able to develop the relationship by **enabling them to address the pain**, i.e. linking them to the subject matter experts in your company, inviting them to the right seminars or linking them up with your references so that they can learn from their experiences on how to handles projects like these.

Once you've built up a real Champion, he/she will recognize your support and understand that you will be able to help them solve their pain. It will become a **joint effort** and your Champion will become a **true defender** of the cause, **selling on your behalf when you're not around**.

Questions to Ask:

- **Why** is this person a champion?
- Does this person have **influence**?
- What is his/her **personal interest**?
- Will he/she stand up for you and **sell on your behalf** when you're not there?

Related Article: More on the Sales Champion

Click [here](#) or scan the QR code below to learn more about the Sales Champion and how you can identify and nurture them.



It will become a joint effort and your Champion will become a true defender of the cause, selling on your behalf when you're not around.



COMPETITION

Competition

What is Competition?

Competition is one of the most neglected and underestimated risk factors when it comes to securing and closing a deal. Even if your prospect assures you that he or she is not looking at other solutions, the final stakeholders greenlighting the project could still **ask for comparisons**. Purchasing could also request **additional quotes** for price comparison sake.

Moreover, competition could go beyond a solution that's offered by another company. It could also refer to the client's **"Do It Yourself (DIY)"** solution or current way of doing things. I.e. The "if it ain't broken why fix it" mentality where they decide to **do nothing and continue with the status quo**.

You really do not want to find out that you were in competition with someone else only **after** losing the deal.

Why Spotting Your Competition Early is Crucial?

Knowing your competition inside out will help you strengthen your case to **neutralize your enemies** early in your sales process. Identifying and building multiple champions will allow you to **grow deeper roots** within your prospect's organization and gain more access to information.

Doing so will also enable you to better understand the needs of the organization, so that you can **set traps** for your competitors and convince your prospect that your solution is the only solution that they will need.

Questions to Ask:



- **Who** are we competing against?
- **Why** are we competing against them?
- Can the prospect do **nothing**?
- Are they adopting an **open source/DIY** approach?
- Who in the account is **championing your competition**?
- Do we know **who else** needs to be involved?

Related Article: More on Competition

Click [here](#) or scan the QR code below to learn more about Competition and how you can detect them early to win.










Knowing your competition inside out will enable you to better understand the needs of the organization, so that you can set traps for your competitors and convince your prospect that your solution is the only solution that they will need.

Conclusion

So, that's MEDDICC in a nutshell. Personally, this has been one of the most effective sales methodologies I've ever worked with. I can't imagine ever qualifying deals without it again. After raising my **close rate to over 90%**, MEDDICC proved itself as a winning methodology. I hope you've found this MEDDICC checklist helpful and feel empowered to go out there to smash more deals.

In case you didn't have the time to go through the whole checklist, here's a little TLDR version. You can also click [here](#) to check out of MEDDICC Checklist on Google Web Stories or scan the QR code below.

M	E	D	D	I	C	C
Metrics  What is the economic impact of the solution?	Economic Buyer  Who has profit and loss responsibility for this project?	Decision Criteria  What are their technical, vendor and financial criteria?	Decision Process  What does their validation and approval process look like?	Identify Pain  What are their primary business objectives?	Champion  Who will sell on your behalf within the company?	Competition  Who are we competing against and why?

MEDDICC Google Web Stories

Scan the QR code below and watch our MEDDICC Checklist on Google Web Stories



Implement MEDDICC on

Are you looking to follow MEDDICC on Salesforce and bring structure to your sales process? **Say goodbye to slipped deals** - Let iSEEit enable you and your sales team to adopt a **common language**, **identify gaps** earlier in your sales process and take **preemptive action** in order to call your deals with **confidence** and build a more **predictable forecast**.

Get in touch with us today and learn more about how you can implement MEDDICC on Salesforce.

[CLICK HERE](#)