The Value Selling Playbook:
Operational Instructions and Toolkit Outline

Lee Levitt
Principal
The Acelera Group
December 2025

Introduction

This playbook is the operational partner to the white paper *The Choreography of the Deal*. While the white paper outlines the philosophy and strategy, this document provides tactical tools, templates, and scripts necessary to execute.

It is designed for Account Executives, Sales Managers, and Enablement Leaders to build the "muscle memory" of value selling.

How to Use This Playbook

This document is not a textbook. It is a field manual designed to operationalize the concepts found in the white paper *The Choreography of the Deal*. It bridges the gap between *knowing* value selling and *doing* value selling.

For the Account Executive (The Choreographer):

- **Don't "read" it; use it.** Before every major stakeholder meeting, print the **Account Intelligence Worksheet (Appendix K)** and fill it out.
- **De-risk your deals.** Before forecasting a commit, run the deal through the **De-Risking Checklist (Appendix N)** and the **CFO Test (Appendix J)**. If it fails, do not commit it.
- **Map the room.** Never enter a Stage 2 opportunity without an active **Influence Map (Appendix P)**. Update the "Trend" column weekly.

For the Sales Manager (The Inspector):

- **Change your 1:1s.** Stop asking "When will it close?" Start using the **Coaching Scripts (Appendix G)** to ask "What is the cost of inaction?" and "Who is the hidden detractor?"
- **Ask “what must be true” for this opportunity to close.**

- **Inspect the artifacts.** If an AE cannot produce a populated **Value Hypothesis** or **Action Plan (Appendix M)**, the deal is not real. And the rep is not earning their base salary.
- **Spot the failure modes.** Use **Appendix D** to diagnose why a deal has stalled and prescribe the specific fix.

For Enablement & Operations:

- **Standardize the tools.** Take the templates in **Appendices K, L, P, and Q** and build them directly into your CRM (Salesforce/HubSpot) fields.
- **Onboard with intent.** Use the **30-Day Plan (Appendix I)** to ensure new hires aren't just learning product features, but learning how to research and choreograph a deal.

Playbook Section Outline

This playbook is organized into five operational zones. Use the guide below to find the right tool for your current deal stage.

PART I: STRATEGY & INSIGHT (The "Why")

Use these tools to build your hypothesis and prepare for the first engagement.

- **Appendix A: Point of View (POV) Library** – Industry-specific scripts to open conversations.
- **Appendix B: Real Enterprise Deal Stories** – Examples of how choreography wins complex deals.
- **Appendix K: Account Intelligence Worksheet** – The mandatory "pre-flight" research checklist.
- **Appendix L: Opportunity SWOT Analysis** – Strategic planning for high-stakes accounts.

PART II: EXECUTION & MECHANICS (The "How")

Use these tools to run effective meetings and navigate discovery.

- **Appendix C: Discovery Mechanics & Call Blueprint** – A minute-by-minute guide to the perfect discovery call.
- **Appendix H: Checklists & Templates** – Quick-reference guides for research, discovery, and POVs.
- **Appendix O: The "Three Whys" Deal Narrative** – The core logic of your deal (Why This, Why Now, Why Us).

PART III: DEAL MANAGEMENT & MOMENTUM (The “Who” and "When")

Use these tools to track progress, map stakeholders, and close.

- **Appendix M: The "Living" Action Plan** – Tracking velocity, risk, and next steps.
- **Appendix P: The Influence & Relationship Map Template** – Visualizing political power and trends.
- **Appendix N: The De-Risking Checklist** – Overcoming "No Decision" and Omission Bias.
- **Appendix Q: The Mutual Success Plan (Close Plan)** – Mapping the path to "Go Live."

PART IV: THE FINANCIAL CASE (The Logic)

Use these tools to win the Economic Buyer and the CFO.

- **Appendix F: Value Quantification Techniques** – Simple formulas for ROI and risk reduction.
- **Appendix J: The CFO Test** – The litmus test for financial approval.

PART V: LEADERSHIP & CULTURE (The Build)

Use these tools to scale the methodology across the organization.

- **Appendix D: Common Failure Modes** – How to diagnose and fix stalled deals.
- **Appendix E: Building a Value Selling Culture** – A roadmap for organizational change.
- **Appendix G: Manager Coaching Scripts** – Questions to drive behavioral change.
- **Appendix I: New Rep Onboarding** – A 30-day plan for competence.

Appendix A: Point of View (POV) Library

A strong Point of View (POV) helps customers see their situation in a new light. It reframes their challenges and guides them toward smarter, faster decisions. A POV is not a pitch—it is a hypothesis about what is happening in their world and what will happen if they fail to act.

Healthcare POVs

- **The Staffing Crisis:** "We believe providers that do not invest in predictive staffing and scheduling will face **20–30% higher labor costs** over the next 18–24 months."
- **Clinician Burnout:** "We believe organizations that fail to streamline clinician workflows will see burnout accelerate and patient satisfaction decline."
- **Fragmented Data:** "We believe multi-site systems that continue using fragmented data systems will face slower cycle times, lower throughput, and increased regulatory exposure."

Financial Services POVs

- **Regulatory Risk:** "Manual compliance processes will become unsustainable as regulatory complexity increases. Institutions that digitize early will reduce risk dramatically."
- **Fraud Detection:** "We believe fraud teams that cannot detect anomalies in real time will see higher losses and longer investigation windows."
- **Speed to Market:** "Legacy platforms will limit speed-to-market for new financial products and slow down growth initiatives."

Technology POVs

- **Margin Erosion:** "SaaS companies that do not consolidate fragmented tooling will see gross margins erode and churn increase."
- **Proactive Retention:** "Customer retention will increasingly depend on proactive, data-driven engagement, not reactive support."
- **AI Readiness:** "Organizations without a coherent AI adoption roadmap by 2026 will face competitive disadvantage."

Manufacturing POVs

- **Supply Chain Resilience:** "Companies without resilient supply chains will experience sustained disadvantages in both cost and delivery reliability."
- **Predictive Maintenance:** "Predictive maintenance is becoming table stakes; reactive maintenance strategies will drive unnecessary downtime."
- **Workforce Modernization:** "Manufacturers who fail to modernize workforce training risk both productivity losses and safety failures."

Appendix B: Real Enterprise Deal Stories

Stories make the concepts of value selling tangible. Here are three real-world examples illustrating how choreography, influence mapping, and hypotheses change outcomes.

Story 1: Reviving a Stalled Deal

- **Situation:** A rep worked a 7-figure deal for nine months with a strong operational champion. Excellent discovery, successful pilot. Yet, the deal stalled.
- **The Turning Point:** An **Influence Map** revealed that Finance had never been engaged, and the CIO was quietly skeptical about integration risks.
- **The Choreography:** The team built a targeted narrative for Finance and paired the champion with a technical executive to address CIO concerns.
- **Outcome:** Momentum returned. The deal closed the next quarter.

Story 2: The Hidden Detractor

- **Situation:** Demos went well, pricing was aligned, stakeholders loved the solution. Suddenly, procurement shut it down.
- **The Post-Mortem:** A senior operations manager felt the project threatened his headcount. He influenced procurement behind the scenes. The rep never engaged him.
- **Lesson:** An **Influence Map** early in the process would have exposed this landmine.

Story 3: Reframing Value to Win the CFO

- **Situation:** People agreed the problem mattered, but there was no urgency.
- **The Pivot:** The rep used a **Value Hypothesis** to quantify delayed revenue, increased manual effort, and risk exposure.
- **Outcome:** Once the CFO saw the **cost of inaction**, he called the project “an operational mandate.”

Appendix C: Discovery Mechanics & Call Blueprint

Great discovery is structured, conversational, and anchored in hypotheses—not a checklist interrogation. It should be a process of co-creation rather than a one sided set of questions.

The customer should learn as much about their own environment and opportunities for improvement as the rep does.

The Blueprint (45–60 Minute Call)

1. Opening & Context (5–10 min)

- Reconfirm agenda and participants.
- Explain what you've learned in research.
- Establish your POV on why the conversation matters.

2. Presenting the Hypothesis (5–10 min)

- **The Unlock:** "Here's what we believe is happening based on customers like you. Where are we off?"
- *Why:* This shifts the conversation from extractive to collaborative.

3. Deepening Discovery (20–30 min)

- **Explore:** Operational pain, financial impact, strategic consequences, internal roadblocks, and influencer dynamics.
- **Key Questions:**
  - "What happens if this problem persists another 6–12 months?"
  - "Who else experiences this pain day-to-day?"
  - "What concerns would Finance or IT raise about fixing this?"

4. Exploring Value & Outcomes (10–15 min)

- Move toward what success looks like and how it will be measured.
- Introduce solution concepts lightly—**do not jump to demo**.

5. Agreeing on Next Steps (5–10 min)

- Confirm needed stakeholders.
- Propose a technical or executive session.
- Outline the next hypothesis you will test.

Discovery Anti-Patterns (Avoid These):

- Shotgun questions.
- Rapid-fire interrogation.
- Product-first pivots.
- Skipping hypothesis validation.

Appendix D: Common Failure Modes in Enterprise Selling

Even great teams fall into predictable traps. Here is how to diagnose them.

Failure Mode	Symptoms	The Fix
Shallow Discovery	No business case; no urgency; vague interest	Use hypotheses; go deeper into internal economics
Weak Champions	Champion can't access power; avoids conflict; inconsistent messaging	Teach champions how to sell internally; provide narrative kits
No Financial Case	CFO "doesn't see it"; value unclear; savings not quantified	Quantify the cost of inaction early
Political Blind Spots	Surprise objections; last-minute blockers; missing stakeholders	Influence Maps. Every time
Premature Demo	Customer excited but uncommitted; technical questions dominate; no executive alignment	Delay demo until value is established

Appendix E: Building a Value Selling Culture

Value selling becomes *mindset* and *culture* through three phases.

Phase 1: Foundation

- Introduce the framework.
- Provide templates (hypothesis, influence map, action plan).
- Set expectations for preparation.
- Review first hypotheses in team meetings.

Phase 2: Behavior Change

- Use value selling in **pipeline reviews**.
- Inspect **action plans**.
- Celebrate great examples.
- Provide coaching scripts for managers.

Phase 3: Reinforcement

- Build value selling into onboarding.
- Certify reps quarterly.
- Align marketing storytelling with the value narrative.
- Require hypotheses for **Stage 1 -> Stage 2 progression**.

Appendix F: Value Quantification Techniques

Quantification does not require an MBA. Start simple.

1. Efficiency Value

- *Formula:* Hours saved × Fully loaded hourly cost × Number of people.
- *Example:* 10 hrs/week × $70/hr × 12 employees = **$436,800 annual value**.

2. Revenue Impact

- *Formula:* Conversion lift × Pipeline volume × Average deal size.

3. Risk Reduction

- *Formula:* Probability of risk event × Financial impact of event.

4. Cost Avoidance

- *Formula:* Legacy tools cost + Overhead + Wasted capacity.

CFO-Ready Tips:

- Use ranges, not precise predictions.
- Use conservative assumptions.
- Tie value directly to goals found in the 10-K.

Appendix G: Manager Coaching Scripts

Managers make or break adoption. Use these high-impact questions.

Strategy Questions

- "What is the customer's business problem *in their own words*?"
- "What is your value hypothesis and what are you validating next?"
- "What's the **cost of inaction**?"

Champion Questions

- "Who is your champion?"
- "How are you enabling them?"
- "What meeting have they booked internally *without* you?"

Political Questions

- "Which stakeholder worries you the most?"
- "Who influences the economic buyer behind the scenes?"
- "What is the **relationship trend**?"

Execution Questions

- "Walk me through the action plan."
- "What's the next internal workshop needed?"
- "What's blocking progress and how do we unblock it?"

Appendix H: Checklists & Templates

Preparation Checklists	
Research Checklist	
Completed Y/N	Activity
	Executive team & recent news
	Annual report / 10-K (Top 3 issues)
	Quarterly performance / 10-Q
	Hiring patterns & Glassdoor reviews
	Internal support issues (SFA check)
Discovery Checklist	
Completed Y/N	Activity
	Draft hypothesis prepared
	Strategic questions ready
	Financial impact discussion prepared
	Stakeholder mapping started
	Clear meeting outcome defined
Champion Enablement Checklist	
Completed Y/N	Activity
	Has influence?
	Has motivation?
	Has air cover?
	Has materials (slides/narrative)?
	Has a clear narrative?
	Has positive RBA balance?
POV Checklist	
Completed Y/N	Activity
	Provocative?
	Relevant?
	Evidence-based?
	Evidence-based?
	Aligns with corporate goals?
	Connects to your solution?

Appendix I: New Rep Onboarding — 30-Day Plan

A structured onboarding plan accelerates competency.

Week 1: Foundations

- Value selling overview.
- Hypothesis building exercises.
- Review of sample hypotheses.
- Research fundamentals (Seeking Alpha, 10-K).

Week 2: Discovery Excellence

- Role-play hypothesis-led discovery.
- Watch call recordings.
- Evaluate conversations for depth and alignment.

Week 3: Champion & Influence

- Influence mapping workshop.
- Identifying informal influencers.
- Building champion enablement kits.

Week 4: Live Fire

- Shadow real discovery calls.
- Participate in multi-threading.
- Build action plans.
- Weekly coaching debriefs.

Appendix J: The CFO Test

Ultimately, most enterprise decisions come down to one question: **“Will Finance approve this?”**

To pass the CFO test, your business case must show:

1. **Measurable ROI**
2. **Conservative assumptions**
3. **Defensible math**
4. **Clear payback period**
5. **Alignment with strategic goals**
6. **Risk mitigation steps**
7. **Operational readiness**

If your champion cannot defend the business case in a five-minute hallway conversation, your deal is at risk.

Appendix K: Account Intelligence Worksheet

Use this one-pager to ground every deal in reality. Fill this out before the first stakeholder meeting.

Company Snapshot

- **Annual Revenue:** _____
- **Employee Count:** _____
- **Fiscal Year End:** _____

Strategic Context (From 10-K/Annual Report)

- **Top Business Issue #1:**
  _____
- **Top Business Issue #2:**
  _____
- **Top Business Issue #3:**
  _____

Competitive Landscape

- **Key Competitors:**
  _____
- **Key Partners:**
  _____
- **Our Current Footprint (if any):**
  _____

Internal Context

- Other Opportunities in Play: *(Are they building a factory? Acquiring a company?)*
- Most Senior Stakeholder Identified:
  _____

Appendix L: Opportunity SWOT Analysis

Use this framework to strategize on your top deals. Be honest about the threats.

Strengths (Internal)

What is our unique advantage in this specific account? (e.g., Strong Champion, specific tech fit)

Weaknesses (Internal)

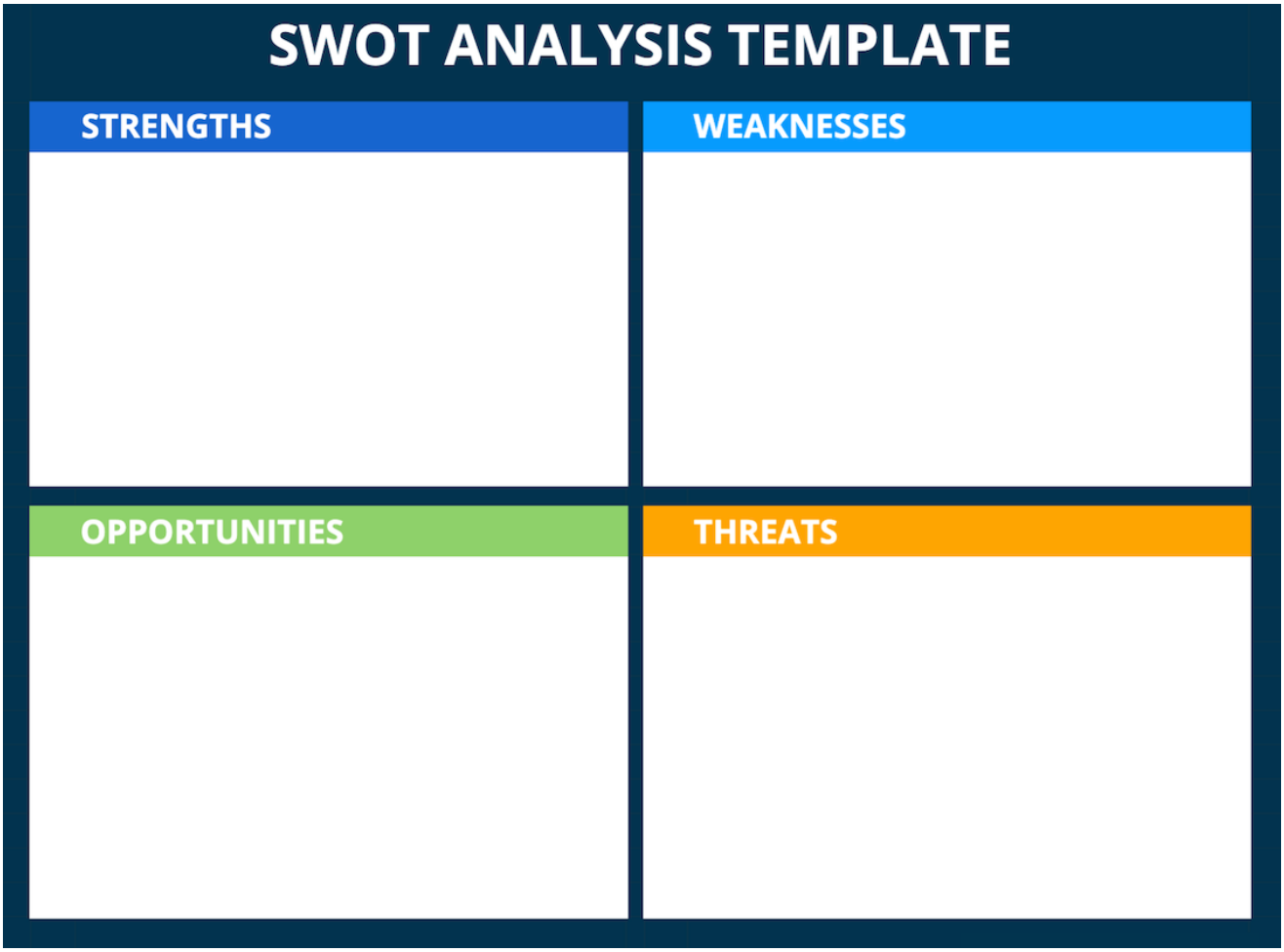
Where are we vulnerable? (e.g., Product gap, weak relationship with CFO)

Opportunities (External)

What external factors can we leverage? (e.g., New regulation, competitor failing)

Threats (External)

What could derail this deal? (e.g., Budget freeze, M&A rumor, "Do Nothing")



Appendix M: The "Living" Action Plan

Deal momentum is not about checking in; it's about moving forward. Update weekly.

Deal Velocity Trackers

1. **Unanswered Discovery Questions:**
   - *What do we still NOT know?*

     _____
2. **Data Needed for Business Case:**
   - *What metrics are missing to prove ROI?*

     _____
3. **Risk Mitigation:**
   - *What is the biggest risk to close?*

     _____
   - *Plan to mitigate:*

     _____

Next "Acts of Influence" (Not just check-ins)

Acts of Influence					
Date	Stakeholder	Objective	Status	At risk	Notes
1/15/2026	John Smith	Validate Hypothesis	Open	No	
1/22/2026	Sally Golding	Review Draft Business Case	Open	Yes	no response

Appendix N: The De-Risking Checklist (Overcoming "No Decision")

Buyers choose "No Decision" when they fear failure. Use this checklist to ensure you have made it safe for them to say "Yes".

De-Risking Checklist			
	Risk Factor	Description	Plan for mitigation
Completed?			
	Personal Risk Identified:	Do I know what this stakeholder personally risks if this project fails? (Reputation, political capital, time).	
	Change Management Mapped:	Have we outlined exactly who will need to change their behavior and how we will support them?	
	Implementation Safety:	Have we provided a clear "Day 1 to Day 90" roadmap to show them they won't be left alone?	
	Downside Protection:	Have we been honest about potential pitfalls and how we will handle them? (Admitting small risks builds trust to overcome big fears).	
	Consensus Check:	Is there a "hidden detractor" who fears this change? Have we engaged them?	

Appendix O: The "Three Whys" Deal Narrative

Before you forecast a deal, can you answer these three questions from the customer's perspective?

The Three Whys		
The Question	The Specific Question	** The Customer's Answer (Not Yours)**
1. Why This? (Why Do Anything?)	What specific business metric is bleeding? Why can't they just patch the legacy system?	
2. Why Now? (The Cost of Inaction)	What bad thing happens in 90 days if they delete your email? Is there a compelling event (e.g., 8-K trigger)?	
3. Why Us? (Differentiation)	Beyond "features," why are we the only safe partner for this specific journey?	

Appendix P: The Influence & Relationship Map Template

Don't just list names. Map the political momentum. Copy this for every key stakeholder.

Visual Key:

- **Strength:** 🟢 (Strong Supporter) | 🟡 (Neutral) | 🔴 (Detractor)
- **Trend:** ⬆️ (Improving) | ➡️ (Static) | ⬇️ (Deteriorating) **<-- CRITICAL**

Managing Your Influence Map						
Name	Title	Role	Biz Goal	Strength	Trend	Action to Improve Trend
Name	CFO	Economic Buyer	Risk Reduction	🟡	⬆️	Connect with peer CFO reference
Name	VP Operations	Champion	Efficiency	🟢	➡️	Equip with slide deck for Board
Name	IT Director	Technical	Security	🔴	⬇️	Schedule session with our CISO

Appendix Q: The Mutual Success Plan (Close Plan)

De-risk the decision by showing them the path to value. Work backwards from their "Go Live" date.

Goal: Go Live by *[Date]* to achieve *[Business Outcome]*

Mutual Success Plan			
Milestone	Owner	Date Due	Status
Value Validation Workshop	[Rep / Champion]		Done
Technical Security Review	[IT / SE]		In Progress
Final Commercial Agreement	[Procurement]		Pending
Kickoff & Team Onboarding	[Customer Success]		Planned
First Value Delivered (Go Live)	[Joint Team]		Planned