Example Sales Call Transcript

Participants:

- **Alex (AE, Salesforce)**

- **Jordan (Sales Director, Apex IT Solutions)**

Context: 30-minute first discovery call. Jordan leads a 40-person GTM org (28 AEs, 12 SDRs) selling managed IT and security services to mid-market accounts.

00:00 – Intro & Agenda

Alex (AE): Hey Jordan, thanks for making the time. Still good for 30 minutes?

Jordan (SD): Yep, let's do it.

Alex: Perfect. Quick agenda: 1) context and goals, 2) what's working/what's not in your sales process, 3) how teams like yours use Salesforce Sales Cloud + Revenue Intelligence (+ optional CPQ), 4) if it makes sense, align on success criteria and next steps. Sound right?

Jordan: Works for me.

02:00 – Discovery (Metrics, Process, Pain, Timeline, Decision)

Alex: How's the team set up today?

Jordan: 28 AEs by geo/segment, 12 SDRs. Average deal is ~$85k ARR. We sell into IT directors/CIOs at 200–1,500-employee companies.

Alex: Got it. What are the top two KPIs you're on the hook for this half?

Jordan: Forecast accuracy and win rate. We're hovering around ±30% on the forecast and ~19% win rate. Cycle time averages 63 days but can blow out in security deals.

Alex: Where's the friction?

Jordan: Hygiene and visibility. Reps live in email/Slack and update Salesforce late—so pipeline inspection on Monday is… creative. Late-stage slippage and approvals for custom pricing add

days. Quotes are still Word + PDF. Forecasting happens in spreadsheets that drift from what's in CRM.

Alex: Understood. Tooling stack?

Jordan: Salesforce (we're on Enterprise), Outlook, Gong, Slack. No CPQ. We use PandaDoc for signatures. Data lake is Snowflake. Identity is Azure AD.

Alex: Who else weighs in if you pursue a change?

Jordan: My VP Sales, RevOps, and IT for integrations. Finance will want to see ROI. Procurement is straightforward once we align on numbers.

Alex: Timing wise?

Jordan: I'd like to improve Q4 predictability. Pilot in ~6 weeks, broader rollout in the quarter if we see signal.

09:00 – Value Mapping (Capabilities to Outcomes)

Alex: Based on what you've shared, three focus areas:

1. **Pipeline hygiene & forecast accuracy**

    ○ **Einstein Activity Capture** to auto-sync email/calendar so opps update themselves.

    ○ **Pipeline Inspection + Revenue Intelligence** for stage aging, commit coverage, risk signals, and coachable moments.

    ○ **Slack Sales Elevate** to surface pipeline changes and commit deltas in your sales channels.

2. **Sales execution & cycle time**

    ○ **Sales Engagement** for structured prospecting, auto-logging, and cadences for SDRs.

    ○ **Guided next steps** and **opportunity scoring** to prioritize accounts most likely to move this week.

3. **Quote-to-close**

- ○ **Salesforce CPQ (phased)** to replace Word-based quotes with guided selling, guardrails, and approval workflows.

- ○ Keep **PandaDoc** for signature or move to Salesforce-native e-sign if you want fewer tools later.

Jordan: If we only did two things first?

Alex: Start with **Revenue Intelligence + Pipeline Inspection** for predictability and **Activity Capture** to fix hygiene. Add **Slack Elevate** for adoption. Then layer CPQ once the core is stable.

14:30 – Light ROI (Back-of-the-Envelope)

Alex: Ballpark ROMI (rough order-of-magnitude), sanity check me:

- 28 AEs × 45 min/day saved via auto-capture and less spreadsheet reconciliation ≈ 21 hours/day → ~420 hours/month. At $100 loaded hourly cost, that's ~$42k/month in reclaimed selling time.

- If forecast accuracy improves from ±30% to ±10–15%, you reduce over/under-commit risk and can target coaching on real risk, typically yielding **+2–4 pts win rate**. On ~$30M annual pipeline, even +3 pts is meaningful seven figures over a year.

Jordan: Those assumptions seem reasonable.

17:30 – Objections & Change Management

Jordan: We've tried "better hygiene" before. Reps don't want more admin.

Alex: Totally. This is about **less** admin: auto-capture minimizes manual logging; Slack surfaces what to update; and Revenue Intelligence gives managers one place to coach. On change management:

- 2-week enablement plan: champions, office hours, and in-app prompts.

- Adoption baselines: weekly activity coverage, opportunity fields completeness, and time-to-update after key meetings.

- We'll co-own an adoption scorecard with RevOps so it doesn't become "extra work."

Jordan: CPQ sounds heavy.

Alex: We can phase it: start with a **minimal catalog + standard discounts** and a single approval path. You'll still cut days off quoting without boiling the ocean.

21:00 – Technical & Security Quick Check

Alex: Integrations: Outlook via native sync, Slack via Sales Elevate, Snowflake through Data Cloud or MuleSoft if you prefer managed pipelines later. SSO with Azure AD is standard. Anything sensitive—data residency, audit—your IT team typically checks during security review. Anything off there?

Jordan: Sounds fine. We'll want SSO and to keep PandaDoc for now.

23:00 – Qualification (MEDDICC-style)

Alex: To make sure we don't miss anything:

- **Metrics:** win rate + forecast accuracy; reduce cycle time.

- **Economic buyer:** Your VP Sales, with Finance weighing ROI, correct?

- **Decision criteria:** forecast accuracy within ±15%, rep time saved, and fewer approval delays?

- **Decision process:** Pilot → validation → security/finance → order form?

- **Implications:** If we don't move by Q4, you're carrying the same volatility into year-end.

- **Champion:** Sounds like you; RevOps as co-sponsor?

Jordan: That's accurate.

25:00 – Rough Packaging & Commercials (Non-binding)

Alex: If we scope for ~40 users initially (AEs + SDR managers), a typical bundle looks like:

- **Sales Cloud Enterprise** (you have this), plus **Revenue Intelligence** and **Sales Engagement** add-ons, and **Slack Sales Elevate**.

- Optional **CPQ** in phase two.

- Implementation: we can bring a certified partner for a 6–8-week pilot—data hygiene, forecasting dashboards, Slack workflows, and enablement.

Jordan: Ballpark cost?

Alex: Pricing depends on your exact SKUs and term, but for planning purposes, teams your size see **low six figures ARR** for the analytics + engagement layers, plus a **one-time SI** in the **mid–high five figures** for a tight pilot. We'll formalize after requirements so you're not paying for shelfware.

Jordan: Okay—send a proper estimate after we lock scope.

27:00 – Next Steps / Mutual Action Plan

Alex: Here's a simple plan, tell me what to tweak:

1. **This week:** 60-minute working session with you + RevOps to define **success criteria** (the three dashboard views you need every Monday, hygiene metrics, and two approval bottlenecks to remove).

2. **Data check:** Enable **Einstein Activity Capture** in a sandbox and connect a Slack pilot channel.

3. **Value demo:** I'll bring our Solution Engineer to show your exact **Pipeline Inspection + Rev Intel** views using your fields.

4. **Commercials:** We convert the plan into a formal proposal with pricing options (Core + Rev Intel now; CPQ as phase two).

5. **Validation:** 2-week pilot with 8–10 reps, measured against the success criteria.

6. **Decision:** If we hit the marks, we roll to production and schedule CPQ discovery.

Jordan: Works. Loop in RevOps and my Sales Ops manager.

Alex: Great—calendar invites coming for the working session and the value demo. I'll also send a one-pager summarizing the ROI assumptions and adoption scorecard so Finance has something concrete.

Jordan: Appreciate it.

Alex: Thanks, Jordan. Talk soon.

Call ends at 29:40