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SMART

SMART BUSINESS RANGE

SaaS Commercial Playbook

How a team wins, qualifies and grows.

WHAT TO KNOW

The model, in your own words

Retention first, growth second

SaaS economics reward keeping revenue before adding it: protect GRR, then scale NRR through expansion in the accounts worth scaling. If you can't explain your motion — how you win, qualify and grow — in plain words, the team can't run it.

OUR IDEAL CUSTOMER, IN ONE HONEST SENTENCE

WHY WE WIN WHEN WE WIN (THE REAL REASON)

WHY WE LOSE WHEN WE LOSE (THE REAL REASON)

WHAT TO SAY

Discovery that uncovers pain

The best discovery questions go beneath the stated need to the business problem, the cost of inaction, and the decision process. Draft yours, then say them out loud — if it sounds like a survey, rewrite it.

MY THREE QUESTIONS THAT REACH THE BUSINESS PROBLEM

MY COST-OF-INACTION QUESTION

MY DECISION-PROCESS QUESTION

WHAT TO SHOW & DO

Proof over promises

THE DEMO MOMENT THAT LANDS HARDEST — AND WHY

THE PROOF I CAN OFFER (REFERENCES, DATA, PILOT)

MY NEXT-STEP CLOSE — SPECIFIC, DATED, MUTUAL

OBJECTIONS & PQLS

Qualify hard, answer honestly

Evidence versus hope

Pipeline optimism is the most expensive habit in SaaS. For each live deal, separate what the buyer has actually done from what they've merely said. A PQL (product-qualified lead) shows behaviour; a hopeful note shows nothing.

DEAL	WHAT THEY'VE DONE	WHAT'S JUST BEEN SAID	VERDICT

THE OBJECTION I HEAR MOST — AND MY ANCHORED ANSWER

KPIS

The numbers that tell the truth

KPI	CURRENT	TARGET	WHAT IT'S TELLING ME

WORKING WITH AI

Prompts for the commercial motion

Built on the 4Ds

Give the AI a role, real context, a constraint, and ask for its reasoning. Anonymise anything you're not permitted to share. Treat every answer as a well-read colleague's view — useful, tested, never the final word.

Qualify a deal honestly

DISCERNMENT

When a deal feels good but you want to check you're not talking yourself into it.

> You are a disciplined qualification coach who has seen every happy-ears mistake. Here's a deal: "[prospect, need, budget, decision process, and what they've actually done — not just said]". Qualify it hard against a framework like MEDDIC. Where am I light on evidence versus hope? What one unknown could kill it? Give a realistic, not optimistic, read with your reasoning.

Why this shape: evidence-versus-hope and realistic-not-optimistic push against the bias to believe your own pipeline.

Interrogate your KPIs

DILIGENCE

When reviewing the numbers, to find what they're actually saying.

> Here are my KPIs with current vs target: "[paste the table]". Which gaps matter most, which are early warnings rather than problems yet, and what would you look into first? Give me your reasoning, not just the numbers — then tell me what you can't know from this data that I should check myself.

Why this shape: asking what the AI can't know from the data builds the habit of adding your context before acting on its read.

Plan with intention. Execute with precision.