

A Sales Advancement Method

A Practical Framework for Qualifying, Developing and Winning B2B Sales Opportunities

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Introduction

The Sales Advancement Method is a structured, practical approach to managing and progressing significant B2B sales opportunities.

It is designed for businesses selling products, software, solutions or professional services where the sales process involves multiple stakeholders, considered investment decisions and extended purchasing cycles.

The framework addresses a common commercial problem: businesses can generate enquiries, conduct meetings, deliver demonstrations and submit proposals without necessarily making meaningful progress towards winning customers.

Sales activity is not the same as sales advancement.

The purpose of this framework is to establish a disciplined but practical approach to understanding the customer, developing the opportunity, demonstrating commercial value and progressing towards a purchasing decision.

It draws upon established enterprise sales principles, including those described by John McMahon in *The Qualified Sales Leader*, while placing particular emphasis on practical execution, customer engagement and measurable progress.

The central principle is straightforward: a sales opportunity advances when something meaningful changes on the customer's side, not simply when the salesperson completes another activity.

1. Qualify the Problem

Is there a sufficiently important reason for the customer to act?

The starting point is to establish whether the prospective customer has a genuine business problem, requirement or opportunity that justifies investment.

Interest in a product or service does not necessarily indicate an intention to purchase.

The objective is to understand the customer's present circumstances, identify the consequences of the problem and determine whether there is a compelling reason to pursue a solution.

Key considerations

- What problem or business requirement is the customer addressing?
- What is the operational, financial or strategic consequence?
- Who is affected and who has responsibility for resolving it?
- Why has the issue become important now?
- What happens if the customer decides to do nothing?
- Is there sufficient urgency and commitment to justify progressing the opportunity?

Practical outcome: A clearly defined customer problem, its consequences and an initial assessment of the likelihood of meaningful action.

McMahon reference: *Identify Pain* and the Three Whys: Why buy? Why buy from us? Why buy now?

2. Establish the Commercial Value

Is solving the problem worth the proposed investment?

Once the problem has been established, the next task is to determine the commercial value of resolving it.

Customers rarely make significant investments solely because a product offers attractive features or improved functionality. Investment needs to be justified by outcomes that matter to the organisation.

These outcomes may include cost reduction, improved productivity, revenue growth, risk reduction, regulatory compliance, improved service delivery or greater organisational capacity.

Where possible, the benefits should be quantified and related to the customer's existing costs, performance measures or strategic objectives.

Key considerations

- What financial or operational benefits could be achieved?
- Can the current cost of the problem be established?
- What improvement would justify the proposed expenditure?
- How does the investment compare with alternative approaches?
- Can the customer articulate a credible business case?
- Who within the organisation values the expected outcomes?

The emphasis should remain on the customer's business case rather than the supplier's justification of its price.

Practical outcome: An agreed understanding of the expected business benefits and sufficient evidence to support the proposed investment.

McMahon reference: *Metrics* — quantifying the business problem and the value of the proposed solution.

3. Understand the Customer Organisation

Who matters in making the purchasing decision?

Significant B2B purchases generally involve several people with different responsibilities, priorities and levels of influence.

The person who first identifies a requirement may not control the budget, establish the evaluation criteria or make the final decision.

Effective sales advancement therefore requires an understanding of the customer organisation beyond the immediate contact.

Key considerations

- Who owns the business problem?
- Who will use or benefit from the solution?
- Who controls or authorises the expenditure?
- Who influences the technical, operational and commercial evaluation?
- Who may oppose or delay the proposed change?
- How are these individuals connected?
- Is there access to the people whose support is essential?

Understanding these relationships allows the sales approach to reflect how the customer actually operates rather than relying upon an assumed organisational structure.

Practical outcome: A stakeholder map identifying the principal decision-makers, influencers, supporters and potential obstacles.

McMahon reference: *Economic Buyer* and stakeholder identification.

4. Develop Internal Advocacy

Who will actively support the proposition within the customer organisation?

A successful sales opportunity frequently depends upon an individual within the customer organisation who recognises the value of the proposed solution and is prepared to help advance it.

A helpful contact is not necessarily an effective internal advocate.

An effective advocate understands the problem, believes in the proposed approach, has organisational credibility and is willing to influence the decision.

Key considerations

- Who has a genuine interest in achieving the proposed outcome?
- Does that individual have sufficient influence and credibility?
- Will they help explain the proposition to other stakeholders?
- Can they provide insight into internal concerns and competing priorities?
- Will they facilitate access to key decision-makers?
- Are they prepared to take practical steps to support the opportunity?

Internal advocacy should be assessed through actions rather than expressions of enthusiasm.

Practical outcome: An identified and engaged internal advocate who actively contributes to progressing the opportunity.

McMahon reference: *Champions* — identifying, developing and testing genuine internal support.

5. Establish Competitive Advantage and Decision Criteria

Why should the customer select this particular solution?

Understanding the customer's problem and demonstrating value are necessary, but they do not automatically establish competitive advantage.

The customer may have several options, including competing suppliers, an internal solution, extending an existing arrangement or postponing the investment.

The objective is to understand how the customer will compare these alternatives and establish where the proposed solution offers a meaningful advantage.

Key considerations

- What criteria will the customer use to evaluate the available options?
- Which requirements are essential and which are desirable?
- What are the principal alternatives?

- Where does the proposed solution offer a demonstrable advantage?
- Does that advantage matter sufficiently to influence the decision?
- Are the evaluation criteria aligned with the original business problem?
- Can the differentiation be supported by evidence?

This stage should also establish whether the customer understands the proposition's distinctive value or regards the available solutions as largely interchangeable.

Practical outcome: A clearly articulated competitive position aligned with the customer's principal decision criteria.

McMahon reference: *Decision Criteria and Competition*.

6. Understand and Navigate the Purchasing Process

How will the customer turn a preferred solution into an approved purchase?

A positive evaluation or verbal indication of preference does not necessarily mean that a purchase is imminent.

The customer may still need to obtain budget approval, complete procurement procedures, undertake technical or security assessments, secure management approval or negotiate contractual terms.

These activities can introduce significant delays or prevent an otherwise attractive opportunity from proceeding.

Key considerations

- What formal decision-making process applies?
- Who must approve the investment?
- Is the required budget available and authorised?
- Will a competitive procurement process be necessary?
- What technical, security, legal or regulatory assessments apply?
- What internal approvals and contractual procedures are required?
- What is the realistic timetable for completing these activities?

For public sector opportunities, this stage also requires an understanding of procurement rules, published evaluation criteria, permissible supplier engagement and the limitations on influencing the purchasing process.

Practical outcome: A realistic purchasing plan identifying the required decisions, approvals, responsibilities, dependencies and likely timescales.

McMahon reference: *Decision Process and Paper Process*.

7. Manage and Advance the Opportunity

What evidence demonstrates that the opportunity is genuinely progressing?

The preceding stages establish the foundations of a credible opportunity. The next challenge is to maintain momentum and translate that understanding into practical progress.

Sales opportunities often remain in a pipeline for extended periods because the salesperson continues to undertake activities without securing corresponding commitments from the customer.

The framework therefore distinguishes between sales activity and customer advancement.

A demonstration, meeting or proposal is not, by itself, evidence of progress.

Meaningful advancement might include agreement on the business problem, confirmation of financial justification, access to a senior decision-maker, acceptance of evaluation criteria or commencement of formal purchasing procedures.

Key considerations

- What has changed since the previous customer interaction?
- What has the customer agreed, confirmed or committed to?
- What important information remains unknown?
- What is preventing the opportunity from progressing?
- What specific action would represent meaningful advancement?
- Who is responsible for that action?
- Is the anticipated purchasing date supported by evidence?

Each significant opportunity should have a clear next step, an accountable owner and an agreed timescale.

Where progress cannot be demonstrated, the opportunity should be reassessed rather than automatically carried forward in the sales forecast.

Practical outcome: An evidence-based opportunity advancement plan, supported by agreed customer actions, realistic milestones and a credible assessment of the likelihood of success.

McMahon reference: The wider MEDDPICC qualification discipline, opportunity reviews, sales coaching and forecast reliability.

8. Secure the Business and Develop the Relationship

How does a successful purchasing decision become a valuable customer relationship?

Winning the initial contract is an important commercial milestone, but the quality of the subsequent customer relationship will determine its longer-term value.

The commitments made during the sales process must translate into successful delivery, measurable outcomes and continued customer confidence.

The transition from sales to implementation or service delivery therefore deserves deliberate attention.

Key considerations

- Are the customer's expectations clearly documented?
- Have the agreed deliverables and responsibilities been confirmed?
- Are the expected business outcomes measurable?
- Is there an effective transition to the delivery or account management team?
- How will customer satisfaction and realised value be assessed?
- Are there opportunities for further development once the initial objectives have been achieved?

This stage also recognises that existing customers may offer substantial opportunities for additional business, provided that the original investment delivers the expected value.

Practical outcome: A successful commercial handover, agreed measures of customer success and a basis for future account development.

McMahon reference: This stage extends beyond the principal MEDDPICC qualification framework to address customer retention, account development and the longer-term commercial relationship.

Applying the Framework

The Sales Advancement Framework is not intended to operate as a rigid sequence of eight administrative stages.

In practice, sales opportunities develop unevenly. Some information may be available at the outset, while other matters emerge only through subsequent discussions.

The framework should therefore be applied as a practical diagnostic and management tool.

For each opportunity, the objective is to establish:

1. **What is known:** Information supported by customer engagement and credible evidence.
2. **What is assumed:** Beliefs or expectations that have not yet been validated.
3. **What is missing:** Information, relationships or commitments essential to progress.
4. **What is preventing progress:** Commercial, organisational, competitive or procedural obstacles.

5. **What needs to happen next:** Specific actions capable of advancing the customer's decision.

The framework can be used in individual opportunity assessments, sales management reviews, pipeline analysis, account planning and the development of more effective sales practices.

It is equally applicable to an experienced salesperson managing a complex opportunity and to a business owner seeking greater visibility and control over the commercial pipeline.

Measuring Sales Advancement

The effectiveness of the framework should be assessed through the quality and progression of opportunities, not simply the volume of sales activity.

Relevant measures include:

Measure	What it demonstrates
Opportunity qualification	Whether genuine customer demand is being distinguished from general interest
Business value established	Whether the proposed investment has a credible commercial justification
Decision-maker engagement	Whether the right people are involved
Internal advocacy	Whether there is active support within the customer organisation
Competitive position	Whether the customer recognises a meaningful advantage
Purchasing readiness	Whether approvals, funding and procurement requirements are understood
Opportunity progression	Whether customer commitments and agreed milestones are being achieved
Forecast reliability	Whether expected sales are supported by evidence
Conversion and sales cycle	Whether opportunities are being won efficiently and within realistic timescales

These measures provide a basis for identifying weaknesses in the sales process and directing attention towards the areas where intervention is most likely to improve results.

The Commercial Value of the Framework

The Sales Advancement Framework provides businesses with a practical method for improving the management of significant sales opportunities.

Its value lies in helping organisations:

- Concentrate resources on opportunities with genuine commercial potential.
- Identify weaknesses and obstacles before they become critical.
- Improve access to decision-makers and strengthen customer relationships.
- Develop more persuasive, evidence-based business cases.
- Establish clearer competitive differentiation.
- Reduce unnecessary sales activity and avoidable delays.
- Improve the reliability of sales forecasts.
- Increase conversion rates and create a more repeatable approach to winning business.

The framework is particularly relevant to organisations where sales depend heavily upon the knowledge, judgement and personal relationships of a founder or a small number of experienced individuals.

By introducing a consistent approach to opportunity assessment and advancement, it becomes possible to retain the benefits of experienced commercial judgement while reducing reliance on informal or inconsistent sales practices.

Relationship to the Commercial Opportunity Blueprint

The Sales Advancement Framework complements the separate Commercial Opportunity Blueprint.

The two address different but connected commercial challenges.

Commercial Opportunity Blueprint

Assessing the market opportunity

Defining the customer proposition

Identifying target markets and buyers

Developing competitive differentiation

Establishing pricing and commercial viability

Designing the route to market

Sales Advancement Framework

Assessing individual sales opportunities

Establishing customer-specific value

Identifying stakeholders and decision-makers

Applying differentiation to a purchasing decision

Justifying the customer's investment

Navigating the customer's purchasing process

Developing a commercial growth approach

Converting opportunities into revenue

The Commercial Opportunity Blueprint establishes what the business should sell, to whom and why.

The Sales Advancement Framework establishes how credible customer opportunities can be developed, progressed and converted into business.

Together, they provide a coherent approach to commercial development, from evaluating market potential through to winning and developing customers.

Conclusion

Effective selling requires more than identifying prospects, conducting meetings and presenting solutions.

It requires an understanding of the customer's business, a credible proposition, access to the right people, a clear appreciation of how decisions are made and the ability to secure meaningful commitments throughout the purchasing process.

The Sales Advancement Framework brings these elements together in a structured but adaptable approach.

Its purpose is not to introduce unnecessary complexity or replace experienced commercial judgement. It is to make that judgement more consistent, more transparent and more effective.

The measure of sales progress is not how much activity has taken place, but how much closer the customer has moved towards making a justified purchasing decision.

Methodology and References

Developed by Gerry Fitzpatrick as an independent commercial sales and business development framework, drawing upon professional experience in enterprise software, services, business development and commercial management.

The framework incorporates principles associated with established enterprise selling methodologies, including John McMahon's *The Qualified Sales Leader: Proven Lessons from a Five-Time CRO* (2021), particularly the MEDDPICC approach to opportunity qualification.

The eight-stage structure, practical application and emphasis on customer advancement represent an independent organisation and interpretation of these principles.

The McMahon references are thematic cross-references rather than a verified chapter-by-chapter concordance; chapter numbering should be checked against the relevant edition before external publication.

Gerry Fitzpatrick | Sales Advancement Framework | October 2026

Note on Commercial Philosophy

The Sales Advancement Framework is based on the principle that successful business development should create genuine and sustainable value for both customer and supplier.

Its purpose is to help organisations identify worthwhile opportunities, understand customer requirements, establish the suitability and value of their propositions, and progress towards well-informed commercial decisions.

The framework does not rely on manufactured urgency, aggressive persuasion, artificial sales techniques or attempts to control the customer's decision-making process.

Instead, it emphasises professional competence, sound commercial judgement, transparency, mutual respect and the willingness to recognise when a proposed transaction is not in either party's interests.

A successful sale is not simply one in which a contract has been secured. It is one in which the customer has made an informed decision, the supplier can deliver what has been promised, and both parties have a reasonable expectation of achieving the intended benefits.

Commercial success should be the consequence of providing genuine value, not the result of pressure or manipulation.