SRENE

PLAYBOOK · ENTERPRISE MOTIONS

The Enterprise Motions Playbook

Strategic selling for complex, multi-stakeholder deals: committees, procurement, legal, security, and the full discipline enterprise deals actually require.

00 Strategic vs. Transactional Selling

An enterprise deal is not a bigger version of a fast, single-decision-maker sale. It runs on a different operating model, and treating it like a scaled-up transactional deal is one of the most common ways good sellers lose good deals.

	TRANSACTIONAL SELLING	STRATEGIC (ENTERPRISE) SELLING
Decision maker	One person, often the end user	A committee: economic buyer, technical buyer, champion, and others
Sales cycle	Days to a few weeks	Months, often two to four quarters
What wins	Price, speed, ease of use	Demonstrated ROI, risk mitigation, internal alignment
Your role	Present and close	Orchestrate people, process, and content across both sides
What can kill it	A better competing offer	Procurement, legal, security, or a stakeholder you never met

The shift that matters most: in strategic selling, the deal doesn't move forward because you pushed harder. It moves forward because you built enough internal alignment, on both sides of the table, that saying yes became the organization's own decision.

01 Selling to a Committee

Most enterprise deals don't die from a bad pitch. They die because a stakeholder nobody was tracking said no in a room the seller was never in.

Map the Buying Committee

ROLE	WHAT THEY NEED FROM YOU
Economic buyer	Controls the budget. Needs a clear, quantified case tied to their own priorities.
Technical buyer / evaluator	Assesses feasibility and risk. Needs real answers, not marketing language.
Champion	Wants this to happen internally. Needs material they can use without you in the room.
End users	Rarely block a deal alone, but quiet skepticism here can stall momentum elsewhere.
Influencers & blockers	May not appear on any org chart. Identify them before they surprise you.
Procurement lead	Owns commercial terms and vendor process. Engages late but holds real veto power.
Security / IT risk owner	Evaluates technical risk independent of the business case entirely.
Legal / contracts owner	Protects the organization on paper. Rarely sees the demo, always sees the MSA.

Power Mapping, Not Just Org Charts

A title tells you someone's rank. It doesn't tell you their actual influence on this specific decision. Map both separately, they're often different people.

- **Formal authority**: who can sign, who controls budget, who sits above the champion
- **Informal influence**: who does the economic buyer actually ask before deciding, whose opinion carries weight in the room even without a senior title
- **Reachability**: which stakeholders will actually take a call from you directly, and which ones you can only reach through your champion
- Revisit this map every few weeks. Committees shift as reorgs, promotions, and new hires happen mid-deal.

Executive & Champion Intelligence

- Map reporting lines and real influence paths, not just titles
- Review recent activity, posts, interviews, and public commentary
- Identify VP or director-level operational buyers likely to champion internally
- Look for recent hires whose mandate suggests a new initiative already underway

Decision Criteria & Process

- Who are all the stakeholders actually involved, not just the ones in your calls
- What does each of them individually need to feel confident saying yes
- What is the real, formal approval and legal/procurement process, in writing if possible

02 Deal Orchestration

Deal orchestration is the discipline of coordinating every moving part, people, content, process, and timing, to drive alignment and momentum on both sides of the table at once.

1 **Map the Organism**

Build a full stakeholder map: economic buyer, technical buyer, champion, influencers, and blockers, before you need it, not after a deal stalls.

2 **Align Your Internal Pod**

Coordinate your own team, sales, solutions/technical, customer success, legal, and any executive sponsor. Everyone has a defined role and owns it.

3 **Create Momentum**

Use shared milestones, executive briefings, and reference conversations to keep both sides moving in parallel, not waiting on each other.

4 **Control the Room**

Own every next step. Never leave a meeting without a defined action, an owner, and a date.

03 Executive Sponsorship

At enterprise scale, peer-level trust closes gaps that a rep alone cannot. An economic buyer often wants to hear directly from someone at your organization who carries comparable weight to their own, not as a courtesy call, but as a real signal that this vendor takes the relationship seriously.

When to Bring in an Executive Sponsor

- At the start of a strategic deal, to signal genuine organizational commitment early
- When a deal stalls and internal alignment on the buyer's side has stopped moving
- Ahead of a competitive decision point, to reinforce the relationship beyond the product
- At contract signature, to open the relationship on the right footing for renewal and expansion

Making the Exec Meeting Worth Having

- Never bring an executive in cold, brief them thoroughly on the account, the stakeholders, and the specific goal of the meeting
- Give the meeting a real purpose beyond relationship-building: a decision to unblock, a risk to address, a commitment to make
- Follow up in writing within 24 hours, restating what was agreed and by whom
- Log every executive touch in the deal record, these moments matter disproportionately to forecast accuracy and are easy to lose track of

04 Mutual Success Planning

A Mutual Success Plan is a co-created, living document that aligns seller and buyer on outcomes, timelines, and responsibilities. It turns a sales process into a shared project, and it measurably improves both forecast accuracy and deal velocity.

Introduce it once discovery is complete and mutual interest is established, typically at technical evaluation or executive alignment: *"I'd like to suggest we build a shared plan together, so we both have clarity on what a great outcome looks like and what it takes to get there."*

The Five Components

Agreed Business Outcomes

- What does success look like 6 and 12 months after go-live
- Specific, measurable outcomes tied to their actual strategic priorities
- A quantified target co-developed with the economic buyer, not handed to them

Technical Evaluation Plan

- Defined scope and success criteria for any pilot or proof of concept
- Named technical owners on both sides
- A clear timeline with an explicit go/no-go milestone

Implementation Roadmap

- A phased plan with real, week-by-week milestones
- Resource commitments from the customer's side, named, not assumed
- A named implementation sponsor and internal champion

Risk Register

- What could realistically slow or derail this deal
- A proactive plan for each identified risk
- Contingency options if timelines shift, decided before they need to

Signature & Launch Timeline

- Target execution date, worked backward from the desired go-live
- Legal, security, and procurement lead times built in from day one
- An internal launch and enablement plan that starts before signature, not after

Why It Wins Deals

- It separates serious buyers from tire-kickers, champions engage, skeptics stall
- It creates internal urgency by tying your deal to the customer's own stated priorities

- It reduces late-stage surprises by surfacing procurement, legal, and security requirements early
- It gives your champion a real tool to sell internally when you're not in the room

05 Competitive Displacement

Displacing an entrenched incumbent is a fundamentally different motion than winning a greenfield deal. The incumbent has switching-cost inertia on their side; you need a reason compelling enough to overcome the organizational friction of change.

What Actually Moves a Displacement Deal

- A specific, current failure or limitation the incumbent has, not a generic feature comparison
- A internal champion who is personally frustrated with the status quo, not just professionally neutral about it
- A quantified cost of inaction: what continuing with the incumbent is actually costing them, in money or risk
- A migration plan that removes fear of the switch itself, data migration, downtime, retraining

Timing Displacement Around Renewal

Find the incumbent's contract renewal or auto-renewal date as early as possible. Displacement conversations that start 6-9 months ahead of that date have real leverage; conversations that start after auto-renewal has already triggered are fighting a much harder battle, often a full extra contract cycle.

06 RFPs & Formal Procurement

A formal RFP (Request for Proposal) or RFI (Request for Information) means the organization has decided to run a structured, often multi-vendor evaluation. Your ability to shape the criteria before it's issued matters more than how well you respond after.

- If you're involved before the RFP is written, help shape the evaluation criteria toward your genuine strengths, this is legitimate and expected, not manipulative
- If you're responding cold to a published RFP with no prior relationship, treat it as a long-shot unless you can quickly build one before the deadline
- Answer exactly what's asked, in the format requested. Scoring committees penalize marketing language and reward direct, specific answers
- Identify the actual evaluators, not just the procurement contact managing the process, and find a way to reach them through your champion
- A no-bid decision is sometimes correct. An RFP with no internal relationship, an unrealistic timeline, and a clear incumbent advantage rarely converts; don't burn a quarter chasing it

07 Procurement & Legal

This is where enterprise deals actually get won or lost after everyone has already agreed the product is right. A verbal yes from your champion is not a closed deal, it's the start of a second sales process, run by people you may never speak with directly.

Procurement

Procurement typically enters late, but can stall a deal everyone has already agreed to for weeks. Their job is risk management and cost control, not product evaluation, so don't sell to them the way you sold to your champion.

- Engage procurement as early as your champion will allow, not after verbal agreement
- Understand their process: budget cycles, competitive bid requirements, preferred vendor lists
- Have standard documentation ready before it's asked for: a W-9, certificate of insurance, and banking details for vendor setup
- Expect negotiation on terms even after price is agreed, that's their job, not a sign the deal is at risk
- Understand budget classification early: whether your deal is treated as CapEx or OpEx can change who approves it and how fast

Contract Terms That Generate the Most Friction

TERM	WHY IT MATTERS
Auto-renewal clauses	Large buyers often push back hard on silent auto-renewal; be ready to offer an opt-out notice window
Liability caps	Their legal team will want caps low; know your organization's real floor before negotiating
Indemnification	Mutual indemnification is standard to expect; one-sided asks from either side slow things down
Audit rights	Especially common in regulated industries; know what you can and can't commit to allowing
Data ownership & portability	Buyers increasingly require clear language on who owns data and how it's returned at offboarding
Most-favored-nation clauses	Some enterprise buyers request pricing parity guarantees; know your policy before it's asked for
Termination rights	Termination for convenience vs. for cause meaningfully changes your revenue predictability

- Master Service Agreements (MSAs) and, increasingly, Data Processing Agreements (DPAs) for any product touching customer data

- Know your own paper's typical negotiation range before you're in the room, so you're not improvising
- Don't let contract review be a surprise, flag it as a real stage in your process, with its own realistic timeline

08 Security & Compliance

Most large organizations require a formal security and vendor risk review before any contract is signed, and often before detailed technical information is even shared. Treat this as a parallel sales process with its own stakeholders, timeline, and requirements.

NDAs & the Security Questionnaire

- A mutual NDA is usually the first document signed, before architecture details, security documentation, or pricing specifics change hands
- Security review commonly means a formal questionnaire (SIG, CAIQ, or a custom internal form), an architecture diagram, and sometimes a recent penetration test summary
- Standard, pre-approved templates for your NDA and security questionnaire responses save real weeks, don't rebuild these from scratch each time

SOC 2 Compliance, Plainly

- **SOC 2 Type I** assesses whether your security controls are designed correctly at a single point in time
- **SOC 2 Type II** assesses whether those controls actually operated effectively over a real period, typically 6-12 months, and is what most enterprise buyers actually expect
- It exists because buyers need independent, third-party assurance that your security claims are real, not just stated
- Know your own compliance status cold. Have your SOC 2 report, or a bridge letter if a renewal is in progress, ready to share under NDA. This single document can accelerate or stall an entire security review

Beyond SOC 2: The Broader Compliance Landscape

- **GDPR / CCPA**: relevant any time the buyer's own customer data (EU or California residents) flows through your product, expect questions on data residency and subject-access-request handling
- **HIPAA**: applies if your product touches protected health information, healthcare buyers will ask for a signed Business Associate Agreement (BAA), not just a compliance statement
- **PCI-DSS**: relevant if payment card data passes through your system at any point, even indirectly
- **FedRAMP**: relevant for public sector and government-adjacent buyers, a much longer and more rigorous authorization process, know early if this applies to a deal
- Industry-specific frameworks vary (financial services, education, insurance), ask your champion directly which internal compliance team will be involved, rather than guessing

Vendor Risk & Financial Viability

- Larger buyers often assess vendor financial stability directly, be prepared for questions about company size, funding, or financial health, especially from newer or smaller vendors

- Cyber liability and errors & omissions (E&O) insurance certificates are commonly required as part of the vendor risk file
- Business continuity and disaster recovery documentation, what happens to their data and access if your systems go down, is a standard ask at this scale

A Realistic Timeline

For a true Fortune 1000-scale buyer, security review, legal, and procurement combined can easily add four to twelve weeks to a deal that was otherwise ready to close. Build this into your forecast from the start, a verbal yes is progress, not a closed deal.

09 Multi-Year Deal Structuring

Enterprise buyers frequently prefer multi-year commitments in exchange for pricing or terms concessions, and larger organizations often have their own fiscal-year and budget-cycle reasons for wanting a longer term locked in.

- Ramped pricing (a lower rate in year one, stepping up in later years) can unlock budget approval by reducing first-year cost impact
- Co-terming, aligning your contract's renewal date with the buyer's other major vendor agreements or fiscal year, is often a real ask, not a minor administrative detail
- Multi-year deals reduce your own churn risk but can reduce your pricing leverage at renewal, weigh the trade-off deliberately, not automatically
- Whatever term you agree to, make sure internal delivery and success teams know it, a three-year commitment changes how you should be investing in the relationship day one

10 Land and Expand

At enterprise scale, the signed contract is rarely the ceiling of the relationship, it's a foothold. The seller motion doesn't stop at close; it shifts toward proving value fast enough to justify expansion into other teams, business units, or use cases within the same account.

- Identify expansion paths during the original sales cycle, not after, ask your champion which other teams have the same problem
- Deliver against the Mutual Success Plan's agreed outcomes visibly and on schedule, expansion conversations are far easier from a position of proven success
- Build relationships with adjacent stakeholders early, even if they're not part of the current deal
- Treat the first deal as a reference-generation opportunity as much as a revenue event, a strong internal reference is often the single fastest path to the next department

A deal this complex is genuinely hard to hold together in email threads and shared folders. A structured, shared workspace, milestones, documents, and stakeholder visibility in one place, is exactly the discipline this playbook describes. It's also exactly what myBivy is built for.