

Welcome to Phil, Your Deal Review Coach

Phil is a [purpose-built AI assistant](#) designed specifically to help you assess and strengthen your sales opportunities. With Phil's guidance, you'll gain a clear, structured understanding of your deals and [receive expert feedback](#) tailored to help you achieve success. Think of Phil as your personal deal strategist, ready to dig into the details with you and enhance your approach.

How Phil Supports Your Deal Review Process

Using a [focused five-step review framework](#), Phil will lead you through critical aspects of your deal to ensure a comprehensive evaluation:

1. Business Case – Clarifying the business problem the prospect needs to solve and its impact.
2. Unique Value Proposition – Emphasizing why your solution stands out against competitors.
3. Consequences of Inaction – Outlining the risks for the prospect if they choose not to act.
4. Risk Assessment and Mitigation – Identifying potential obstacles and how to address them.
5. Next Steps – Mapping out specific actions to advance the deal.

At each step, Phil will ask you [targeted questions](#), [verify your responses](#), and [provide feedback](#) to sharpen your approach.

Best Practices for an Effective Deal Review Session

Here's how to make the most of your session with Phil and get the most value from his insights:

- [Be Specific and Transparent](#): Phil's guidance is as good as the information you provide. Clearly describe the prospect's pain points, decision-making team, and critical metrics. For example, mention specific goals, timelines, or stakeholders if available.
- [Focus on Each Question](#): Phil's structured approach is designed for sequential flow. Take one question at a time, and if Phil restates your answers or seeks clarification, it's to ensure no essential detail is overlooked.
- [Encourage Depth in Feedback](#): Don't hesitate to ask Phil for more examples, numbers, or even competitive insights to deepen your understanding of his advice. This level of detail can help you fine-tune your approach.
- [Ask for a Summary if Needed](#): If Phil's response is extensive, simply type "summary," and he'll condense the main points for easier review.
- [Stay Deal-Focused](#): Phil's questions and feedback are centered on your deal; if unrelated topics arise, Phil will help redirect the conversation to keep the focus on your goals.

Making Each Question Count

For the most effective responses:

- **Business Case:** Describe the prospect's pain point and the measurable impact of solving it.
- **Unique Value Proposition:** Articulate what differentiates your solution in a way that aligns with the prospect's needs.
- **Consequences of Inaction:** Discuss what is at stake for the prospect and how your solution mitigates that risk.
- **Risk Assessment:** Address known risks, including internal factors (e.g., timeline issues) and external ones (e.g., competitive threats).
- **Next Steps:** Lay out a clear path forward, noting key dates, decision-makers, and any dependencies.

Concluding Each Session with Phil

At the end of each question, Phil will summarize your responses and feedback, giving you a chance to refine any points as needed. He'll also provide a performance rating and final recommendations if you're ready, helping you to gauge your preparedness and identify areas for improvement. This personalized approach will set you up with a roadmap for winning each deal.

Remember, Phil is Here to Help You Succeed!

Phil is not just an assistant—he's a seasoned coach invested in your success. As you build this partnership, you'll refine your sales strategy, deepen your insights, and optimize each deal's potential. Dive into your session with Phil and take each opportunity to strengthen your approach for closing big deals with confidence.

Using these guidelines will ensure you capture the full value of Phil's [deal review](#) expertise as a powerful addition to your sales toolkit.

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