

MEDDPICC

A plain-English, evidence-first guide you can use in board meetings and pipeline reviews.

Promise. After reading this, you can do three things fast:

- Tell whether a company truly runs MEDDPICC or is doing theater.
- Diagnose why a deal will slip *before* the forecast shows it.
- Pressure-test a pipeline with names, dates, and documents—not vibes.

Executive Summary

Top line (say this first). MEDDPICC is a way to run enterprise sales like an evidence system. It prevents “good stories” from becoming “bad forecasts.”

What it solves. Most enterprise misses come from one of three things: (1) the money owner was never truly engaged, (2) the customer’s internal decision + approval path was misunderstood, or (3) paperwork (legal/procurement/security) started too late.

How to use it in a board room. Treat each letter as a **lock**. A deal is **Commit** only when every lock has (a) a **name**, (b) a **date on the customer’s calendar**, and (c) a **document or customer action** that proves progress.

The 2-minute Commit test. For any deal forecast inside the quarter, ask eight yes/no questions:

- Metrics: customer-accepted value math?
- Economic Buyer: budget owner met and aligned?
- Decision Criteria: must-haves + lose conditions known?
- Decision Process: internal steps + dates known?
- Paper Process: legal/procurement/security already started?
- Identify Pain: real consequence + forcing date?
- Champion: political capital being spent this week?
- Competition: real alternatives named (incl. “do nothing”) + plan?

One rule that catches most lies. If the close date is not anchored to a specific customer decision event *and* an active paper process, it is not a forecast date—it is a wish.

Reading tip. Skim Section 2 as a set of proof tests. If any letter cannot be answered with specifics, you have found the slip *before* the forecast admits it.

1) What MEDDPICC actually is (plain English)

Enterprise selling is not persuasion. It is proof management. MEDDPICC is a framework for turning a forecast from *hope* into *evidence*. It forces one question:

What must be true for this deal to close on time—and what proof do we have that it's true?

Why deals die without it

- You sell to people who cannot buy.
- The customer's real rules for choosing remain unknown until late.
- “Pilot success” is mistaken for “deal success.”
- Legal / procurement / security starts late and adds weeks.

Why forecasts go wrong without it

Teams confuse **interest** with **progress**. Progress is not meetings. Progress is the customer completing **irreversible steps**: calendarized decision meetings, approvals, paperwork started, redlines exchanged.

Rule. If you cannot point to **names, dates, and documents**, you do not have a forecast—you have a story.

2) Each Letter (M E D D P I C C) — evidence, tests, and failure modes

How to read the tables

Each letter is one “lock” on the door. A **commit** deal should have credible entries for *every* lock.

M — Metrics (the money math)

Item	What it is
Meaning	The customer has a numbers-based reason to buy (money saved, money made, risk reduced).
Proof (not opinions)	Customer-owned value logic (email, slide, spreadsheet, or explicit statement) with baseline + target + \$ value they accept.
Test question	What number changes if they buy, and what is it worth in dollars? Show me the customer's version.
Self-lie	"We save them 20%." (20% of <i>what?</i> measured <i>how?</i> agreed by <i>whom?</i>)
Forecast error pattern	Budget scrutiny arrives late; the deal cannot survive CFO-level questions; it slips.

E — Economic Buyer (the person who can approve the money)

Item	What it is
Meaning	The person who can approve or block the spend. Not the friendliest exec. The real budget authority.
Proof (not opinions)	You have spoken with them; they confirm why now, how it is funded , and what they need to approve.
Test question	Who can say yes to the money, and when did we last speak? What did they say they need to approve this?
Self-lie	Treating a senior sponsor as the EB when Finance/IT/CFO controls the money.
Forecast error pattern	EB enters late; changes scope/timing/vendor or kills it; "surprise slip."

D — Decision Criteria (the rules for choosing a vendor)

Item	What it is
Meaning	The customer's scorecard : the specific requirements used to pick a vendor.
Proof (not opinions)	Customer-stated criteria with must-have vs nice-to-have , plus how they evaluate/weight them (ideally written).
Test question	What are the top 5 must-haves, and where do we win/lose? What did the customer say, exactly?
Self-lie	Replacing customer criteria with pitch categories (“they care about ease of use”).
Forecast error pattern	Late-stage “new requirement” appears (security, integration, residency); deal stalls or disqualifies.

D — Decision Process (the steps to reach the decision)

Item	What it is
Meaning	The customer's internal path from “interested” to “we chose you”: who meets, who recommends, who approves, and when.
Proof (not opinions)	A step-by-step sequence with owners + dates anchored to real customer meetings (steering, architecture, exec review).
Test question	Walk me from today to “we chose you.” What are the steps, owners, and dates on the calendar?
Self-lie	Confusing <i>our</i> sales stages with <i>their</i> decision steps (“next is proposal”).
Forecast error pattern	One internal meeting slips; everything slips; the forecast date was never calendar-anchored.

P — Paper Process (the steps to get to signature)

Item	What it is
Meaning	Everything after “we picked you” that still blocks signature: legal, procurement, security, onboarding, insurance, payment terms.
Proof (not opinions)	Paper is already moving: named owners, questionnaires opened, templates exchanged, redlines in flight, cycle time known.
Test question	What paperwork steps remain, who owns each, and typical cycle time here? What has started already?
Self-lie	“It’s just legal.” (Nobody measured it, owned it, or started early.)
Forecast error pattern	Verbal yes happens; paper adds 4–8+ weeks; quarter miss despite “agreement.”

I — Identify Pain (why change, and why now)

Item	What it is
Meaning	A real problem with consequences. Not “interesting.” Something that hurts if unchanged.
Proof (not opinions)	Concrete consequences and a forcing event: audit risk, SLA penalties, revenue leakage, churn, incidents, mandate, deadline.
Test question	What bad thing happens if they don’t act by <date>, and who is accountable?
Self-lie	Confusing curiosity (“they love AI”) with pain (budget + urgency).
Forecast error pattern	No forcing event; deal drifts and slides quarter after quarter without “losing.”

C — Champion (the inside person who will fight for you)

Item	What it is
Meaning	A person who spends political capital for you when you are not in the room.
Proof (not opinions)	They create access upward, share inside truth (budget, objections, competitors), correct the plan, push internal steps.
Test question	What did the champion do last week that cost them something (time, credibility, risk) to move this forward?
Self-lie	Calling a friendly user a champion because they attend meetings.
Forecast error pattern	Objections arise; nobody inside pushes back; deal stalls; “champion” evaporates.

C — Competition (what you’re really up against)

Item	What it is
Meaning	Another vendor, the incumbent, “build it,” or “do nothing.” All are competitors.
Proof (not opinions)	Competitors named; their advantage in this account understood; your differentiation mapped to customer criteria.
Test question	Who/what are we up against, what is their strongest advantage here, and how do we neutralize it?
Self-lie	“No competition.” (Customers say “you’re the favorite” and still buy the incumbent.)
Forecast error pattern	Late loss that feels sudden; the threat was never surfaced or planned against.

3) One realistic enterprise deal walkthrough (6–12 months)

Example deal: 9-month enterprise SaaS deal (\$450k ARR), security/compliance buyer, 4,000-employee company.

Timeline: how MEDDPICC should mature

Time	What's happening	CRO forcing function (what must become true)
Month 0–1	Early discovery; interest forms	Lock Pain (consequence + deadline). Start rough Metrics .
Month 2–3	Requirements surface; comparison begins	Get real Decision Criteria (must vs nice) and name Competition .
Month 4–5	Pilot/evaluation	Separate product success from deal proof: meet Economic Buyer ; calendarize Decision Process .
Month 6–7	Selection approaches	Put decision events on the customer's calendar (architecture review, exec review, selection meeting).
Month 8–9	Contracting	Start Paper Process early: owners named, redlines moving, procurement steps known.

Where most reps fail

- They meet the Economic Buyer too late (or not at all).
- They never learn the real decision process—only their own stage labels.
- They start paperwork after “verbal yes.”
- They call someone a champion who will not create upward access.

How an experienced CRO thinks

Not “How do you feel about the deal?” Instead: **What changed at the customer this week that makes signature more likely?**

4) How to audit a portfolio company (board-ready)

A) Board-level questions that force truth

Ask these on the top 10 deals in **Commit** / **Best Case**. Require names, dates, and artifacts.

1. **Economic Buyer:** Name them. When did we last speak? What do they need to approve?

2. **Decision Process:** What are the next two customer decision events (dates + attendees)?
3. **Paper Process:** What paper steps are already started? Who owns each? Typical cycle time here?
4. **Decision Criteria:** What are the must-haves? Where can we lose? What did the customer say?
5. **Champion:** What did the champion do last week to move this forward without us present?
6. **Metrics:** Show the customer's value logic (email/slide/spreadsheet). Baseline and target?

B) Red flags that predict misses

Red flag	What it usually means (and why it misses)
EB not met in late stage	No authority engaged; decision can change late.
Close date is “end of month/quarter”	Date is wishful; not anchored to a customer meeting.
“Legal is reviewing” (no owner, no redlines)	Paper not owned; cycle time unknown; slips by default.
Decision process described vaguely	Internal steps and meeting cadence unknown; plan is imaginary.
“No competition”	Reality not surfaced; late-stage incumbent pull happens.
Champion cannot introduce upward	No political power; objections will stall the deal.

C) MEDDPICC theater vs strong execution

Topic	Theater looks like	Strong execution looks like
Metrics	Vendor ROI slide	Customer repeats/uses the math internally
Economic Buyer	“We have exec support”	EB named + met + states approval needs
Decision Criteria	Generic bullets	Must-haves + lose conditions + weighting
Decision Process	CRM stages	Customer meetings + owners + dates
Paper Process	Started after verbal yes	Started early; redlines moving; cycle time known
Champion	Friendly user	Political capital; creates access; shares inside truth
Competition	“None”	Named threats + account-specific plan

5) Make it memorable

A) Metaphor: 8 locks on a door

An enterprise deal is a door with **8 locks**. MEDDPICC is the lock list. Missing a lock does not always mean “lose,” but it usually means **not closing when you said it would**.

B) The 2-minute commit test

A deal is not **Commit** unless all eight are “yes” with specifics:

1. Metrics: customer-accepted value math?
2. Economic Buyer: budget owner met and aligned?
3. Decision Criteria: must-haves + lose conditions known?
4. Decision Process: steps + dates known?
5. Paper Process: legal/procurement/security started?
6. Identify Pain: consequence + deadline real?

7. Champion: political capital being spent this week?
8. Competition: threats named + neutralization plan?

C) What to listen for when a CRO speaks

You want to hear	You should distrust
Names (“CFO Jane Patel”)	Titles (“the CFO”)
Dates tied to customer meetings	Dates tied to calendar hope
Documents/actions (“redlines exchanged”)	Vibes (“they love us”)
Risks stated plainly	Risks hidden behind stage labels
Competitors named	“No competition”

Conclusion

MEDDPICC is not a “sales methodology.” It is a discipline for separating **evidence** from **enthusiasm**.

If you remember only three things

1. **Names, dates, documents.** Every serious deal has all three. If not, the deal is early or imaginary.
2. **Decision path beats deal stage.** Your CRM stage does not predict timing. The customer’s calendar does.
3. **Paper is part of the product.** In enterprise, signature speed is often constrained more by legal/procurement/security than by product preference.

What “strong” looks like in one sentence

A strong enterprise forecast is built on **customer actions completed** (decision events held, approvals secured, paperwork in motion), not on sentiment (“they love us”).

Board-level close-date sanity check

For every “Commit” deal: ask, **What is the next irreversible customer event?** If the answer is not a dated decision meeting or an active contracting milestone, the close date should move to Best Case.

Bottom line. Treat MEDDPICC like an operating system for proof. It will not make weak deals close—but it will stop weak deals from polluting your forecast.