MAYBERRY ADVISORY | REFERENCE GUIDE

Quick Start Guide for Missionary AEs

Learning your customer and driving strategy and tactics, in ten stages from market to handoff. Each stage has steps, documentation, tools, an exit rule and the numbers to track.

An account does not move to the next stage until the exit rule is met. That one rule keeps a thin pipeline honest. The worked example is Pantheon.io, a platform for hosting and managing WordPress and Drupal sites. It is built from public information as a demonstration.



Stage numbers are one pass. The loop runs the whole path again with new accounts, new triggers and new assets.

HOW TO USE THIS GUIDE

Read It Once, Then Run It Stage by Stage

This guide stands on its own. It does not need the website. Use it as a checklist at the start of each stage and again when you review the pass.

The Stages

1	Market Analysis	Page 3
2	Customer Segmentation	Page 4
3	Marketing Qualified Leads	Page 5
4	Inbound	Page 6
5	Outbound	Page 7
6	Discovery	Page 8
7	Proposal	Page 9
8	Close	Page 10
9	Booked	Page 11
10	Handoff to Customer Success	Page 12

Who Gets Worked by Hand

Stage 2 sorts every account into a tier. The tier decides how much hand work an account earns. The counts are planning assumptions for the example. Set Tier 1 by how many accounts one seller can research by hand.



About the Example

Pantheon has not engaged Mayberry Advisory or reviewed this guide. Facts come from pantheon.io and its press release, read October 21, 2026. Product details can change after that date. Where a number is an assumption, the text says so.

STAGE 1 OF 10

Market Analysis

Market analysis. Learn how buyers think, in their words, before you write a single message.



Steps

- Write five questions: who feels the pain, what they do today, what event makes it hurt, who signs, and what it costs to ignore.
- Hold ten buyer conversations before you write any outreach. Ask for a learning call, not a demo.
- Read what buyers publish: annual reports, job posts, conference agendas, public procurement notices.
- Mine closed-lost deals and call recordings for the exact phrases buyers use.
- Write the one-page market brief.

Documentation

A one-page market brief. A buyer language sheet with the exact phrases.

Tools

CRM history, call recordings, Clay or ZoomInfo for lists, one spreadsheet.

> **For Pantheon:** organizations that run dozens of sites on WordPress or Drupal. Triggers to test in the first ten calls: Drupal 10 end of life, a site count that grew faster than the team, and unwanted bot traffic. Today's workaround to expect: visit each site, update each site, lean on an agency. All of it is a hypothesis until buyers say it.

EXIT RULE	NUMBER TO TRACK
One sentence: who has the problem, what triggers a buy, how they cope today and what it costs.	Calls held, conversion rates, click-through rates and engagement health.

STAGE 2 OF 10

Customer Segmentation

Customer segmentation. Decide who gets hand-written work, who gets a template, and who gets nothing yet.

1 2 3 4 5 6 7 8 9 10

Tier	Who	Example size	How to work them
Tier 1	Right fit, and a trigger is live now.	About 30 accounts	Hand-written messages. Four channels. Three contacts mapped per account.
Tier 2	Right fit, no trigger yet.	About 150 accounts	Template with one custom line. Two channels. Watch for a trigger.
Tier 3	Loose fit.	The rest	Inbound and the slow cadence only. No seller time.

Counts are planning assumptions for the example. Set Tier 1 by how many accounts one seller can research by hand.

Steps

- Write the fit rules: organization type, number of sites, platforms in use.
- Add the trigger as its own field, with a date and a source.
- For each Tier 1 account, map three people: the signer, the champion candidate and the technical reviewer.
- Assign one owner per account.
- Review the tiers monthly. Move accounts up when a trigger appears.

Documentation

The account list with tier, trigger, owner and contact map.

Tools

CRM fields for tier, trigger and owner. Clay or Apollo to fill in contacts.

> **For Pantheon:** a Tier 1 account is a university or public body with many sites, a named owner of the web platform, and sites still on a Drupal version nearing end of life.

EXIT RULE	NUMBER TO TRACK
Every Tier 1 account has a trigger note and three mapped contacts.	Share of Tier 1 accounts with three mapped contacts.

STAGE 3 OF 10

Marketing Qualified Leads

Marketing qualified leads. A written rule for when a lead is worth a seller's time, and how fast the seller must act.

1 2 3 4 5 6 7 8 9 10

Type	Signal	Points
Fit	The account is Tier 1 or Tier 2.	**30**
Fit	The title is head of web platform, director of digital, or CIO.	**20**
Interest	They reply to outreach.	**40**
Interest	They fill in the fleet inventory worksheet.	**25**
Interest	They visit the pricing page twice.	**15**

Example points. A lead at 60 or more is a marketing qualified lead. Tune the points after you see which leads become meetings.

Steps

- Write the definition on one page. Sales and marketing both sign it.
- Split the score into fit (can they buy) and interest (did they act).
- Set the speed rule: a seller reaches out within one business day.
- Route by score to a named owner. No shared queue.
- Review rejected leads every week. Change the rule when sellers keep rejecting the same kind.

Documentation

The signed definition. The lead source and the asset that created the lead, on every record.

Tools

HubSpot scoring or Salesforce rules.

EXIT RULE	NUMBER TO TRACK
A score sends a lead to a named owner, with the source and the asset attached.	Marketing qualified lead to meeting rate, and hours to first touch.

STAGE 4 OF 10

Inbound

Creating inbound leads. A missionary product gets little search traffic, so you make the reasons to raise a hand.



Steps

- Write the fleet note: a one-page description of what changes when a team runs its sites as one set.
- Build the fleet inventory worksheet. The buyer lists every site with its platform, version, owner, last update and who has admin access.
- Record a 90 second video of what a one-view look at a fleet shows.
- Host a small roundtable of web platform leaders from Tier 1 accounts.
- Have each seller post weekly about the problem, in their own voice.

Documentation

An asset map: which asset serves which stage and which person.

Tools

HubSpot forms and landing pages. Tracked links that write to the CRM. LinkedIn.

> **For Pantheon:** the worksheet is the best asset. The buyer writes the list, so the buyer sees the problem. Nobody argues with a list they wrote.

EXIT RULE	NUMBER TO TRACK
Every asset has a tracked link and a follow-up rule.	Inbound leads per month from Tier 1 and Tier 2 accounts.

STAGE 5 OF 10

Outbound

Multi-channel outbound. Each channel has one job. The sequences further down put them in order.



Channel	Its job	The rule
Email	Makes the case in writing.	One idea per message. A question or an asset in every one.
Phone	Gets a live answer.	Call at two different times of day. Keep voicemails to 20 seconds.
LinkedIn	Puts a face on the name.	Connect first with no note. Pitch later, if at all.
Warm route	Asks someone for a name.	Make the ask small. A name, not a meeting.
Video	Shows you did the work on their situation.	90 seconds. Their public facts only.
Roundtable	Puts peers in a room.	Peers talk. The seller listens and hosts.

Rules of Repetition

- Every touch gives a new reason to read it. Never write "just checking in."
- Change the channel and the time of day on each retry.
- Stop the sequence the moment anyone replies or books a meeting.
- Log every touch with its channel, date and outcome.
- Review the replies and the silences every week. Rewrite the weakest touch.

Documentation

A touch log in the CRM. A reply code on each record: interested, not now, wrong person, never.

Tools

HubSpot Sequences, Outreach or Salesloft, the dialer, LinkedIn.

EXIT RULE	NUMBER TO TRACK
A meeting is booked, or the record is closed with a reason and a return date.	Meetings booked per 100 Tier 1 and Tier 2 contacts worked.

STAGE 6 OF 10

Discovery

Discovery. The goal is to find the one or two outcomes the buyer must deliver this year, and to show how the current way of working puts them at risk.



Steps

- Build the brief from the CRM, past calls, news and the org chart.
- Send a short agenda two days ahead.
- Ask what the buyer must deliver this year. Listen for the words they use.
- Walk through the current process step by step. Size the cost with the buyer, in the buyer's numbers.
- Name who else must say yes.
- End with a dated next step. Send the recap within the hour.

Documentation

A discovery record: trigger, current process, cost, outcomes, buying committee, next step. The shared plan, opened on this call.

Tools

Call capture, CRM, shared document.

> **For Pantheon:** ask the buyer to walk through the last time a site update went wrong. Then count the sites together. The count is the cost.

EXIT RULE	NUMBER TO TRACK
A champion is named, the cost is estimated in the buyer's numbers, and the next step has a date.	Discovery calls with three or more contacts mapped.

STAGE 7 OF 10

Proposal

Proposal. For a new category, the proposal starts small: a pilot on part of the estate, with written success metrics and a path to the rest.



Steps

- Walk the draft through with the champion before you send it.
- Write the success metrics in the buyer's words.
- Write the terms so the pilot moves to a full agreement when the metrics are met.
- Add the price and the timeline for the technical and security review.
- Name who signs and by when.

Documentation

The proposal. The success metric sheet. Answers to technical questions from the approved answer library, checked by the engineer.

Tools

CRM quote, deal desk, shared document.

> **For Pantheon:** a pilot could cover a slice of the fleet, with a written definition of done for each site that moves. Pantheon's plan structure and price are unknown, so the terms follow whatever Pantheon sets.

EXIT RULE	NUMBER TO TRACK
The champion confirms in writing that the success metrics are right.	Days from discovery to proposal. Share of proposals with written success metrics.

STAGE 8 OF 10

Close

Close. Long deals die in paperwork and in silence. The shared plan keeps both in view.



Steps

- Confirm every date in the shared plan with the champion.
- Start legal and procurement early, in parallel.
- The VP calls the executive sponsor. Only the VP can have this one.
- The deal desk issues the quote. It must match the order form.
- Get the signature. Update the CRM the same day.

Documentation

The signed order form. The final version of the shared plan.

Tools

CRM, e-signature, deal desk.

EXIT RULE	NUMBER TO TRACK
The signed order form is attached to the deal.	Days from proposal to signature. Close dates that slipped.

STAGE 9 OF 10

Booked

Booked. A deal is not won until the paper, the quote and the billing agree.



Steps

- Attach the order form to the account.
- Check that the quote, the order form and the first invoice show the same price and dates.
- Copy the success metrics into the account record.
- Create the renewal date.
- Mark the deal closed won only when every item is done.

Documentation

A booking checklist, signed off by the seller and the deal desk.

Tools

CRM and the billing system.

EXIT RULE	NUMBER TO TRACK
The checklist is complete with no open items.	Bookings with no error at the first invoice.

STAGE 10 OF 10

Handoff to Customer Success

Handoff to customer success for setup. The buyer should not have to explain the deal twice.



Steps

- The seller writes the handoff record within one business day of signature.
- Hold the handoff call within three business days: seller, customer success, engineer and the champion.
- Write down every promise the seller made.
- The seller stays involved for the first 30 days.
- Send usage data back to the seller, so the renewal holds no surprises.

The Handoff Record Holds

Why they bought. The one or two outcomes the buyer must deliver this year. Who is involved and their roles. What was promised. The success metrics. Technical needs. Known risks. Key dates.

Tools

The CRM account record, an onboarding checklist, product usage data.

> **For Pantheon:** the record would also hold the site inventory, the agency contacts, the order in which sites move, and who gets which role on each site.

EXIT RULE	NUMBER TO TRACK
A customer success owner is named and has met the champion.	Days from signature to first live use.

NEXT

Run the Pass, Then Run It Again

The ten stages are one pass. Most teams run a sequence once, drop the accounts that did not answer, and move on. Keep them. A "not now" is a date, not a no. The companion guide, Custom Sequences for Pantheon, has the four message programs and the trigger watchlist.

> **Want this built for your product?** Doug builds the sequences, the scoring, the quarterly loop and the handoffs with you, and writes the first messages. Book a discovery call

Doug Mayberry
Enterprise Sales and Systems Design
Norman, Oklahoma | October 2026