How Enterprise Buyers Move

Six stages from first trigger to renewal, and five playbooks for working them.

For: Enterprise teams
As of October 26, 2026

A large deal passes through six stages. At each one, a different group is involved, the buyer believes something different, and a different tool should carry the data. This guide walks you through the six stages, then five playbooks for working them: hunt, convert, expand, forecast and close. A renewal is the next trigger, so the path loops back to the start.

What You Need

You'll get the most from this guide with one real account in front of you. Doug starts with a real deal, not a tool list. The tables below show the tools and inputs each stage uses.

Tools

Tool	Where you'll use it
Account research	Stage 1
CRM (customer relationship management tool, where you track accounts and deals)	Stages 1, 2, 3, 4 and 6
Email and call notes	Stage 2
Quoting	Stage 3
Shared documents	Stage 3
Forecast view and business case	Stage 4
Contract tool and e-signature	Stage 5
Billing	Stage 5
Customer success platform and usage data	Stage 6

Inputs for each playbook

Playbook	What you'll bring
Hunt	Target account list, outside triggers, contact data
Convert	First meeting notes, a named champion, the outcome the buyer must deliver

Playbook	What you'll bring
Expand	Current contract, usage, the account plan
Forecast	Stage, exit criteria, close dates, approval dates
Close	Approved scope, approval dates, contract terms

A champion is the person who pushes your deal inside the buyer's company. Exit criteria are the conditions the buyer, not the rep, has to meet before a deal moves to the next stage.

Research

These findings come from Doug's stage map. The counts are of the roles named for each stage. They aren't a survey.

Who Is Involved and What the Buyer Believes

Stage	Who's involved	People named	What the buyer believes
1 Trigger	One executive, or an outside event such as a budget change, a new leader, or a vendor change	1	Something has to change, but not yet how.
2 Build the Group	Purchasing, an IT or operations leader, a technical evaluator	3	Someone else should own the risk.
3 Shape the Solution	Technical specialists, the champion, finance	3	Will this fit what we already run?
4 Executive Approval	The CFO and the CIO. Sometimes legal and security	2, plus 2 sometimes	Show me the return and the risk in my terms.
5 Contract and Start	Legal, purchasing, delivery, billing	4	Terms are final once we sign.
6 Renewal	The original champion, finance, often a new executive	2, plus 1 often	Did we get what we paid for?

Source: counted from the roles named for each stage in Doug's stage map.

What the Tool Map Shows

- The CRM carries data in stages 1, 2, 3, 4 and 6.
- Stage 5 is the one stage where the CRM isn't named. It's where signed terms get retyped by hand.
- A renewal is the next trigger. Stage 6 feeds stage 1.

Source: Doug's tool map by stage.

One Number to Track for Each Playbook

Playbook	Number to track
Hunt	Days from first qualified signal to first meeting with the person who owns budget
Convert	Conversion from each stage, counting only deals where the buyer met the exit criteria
Expand	Open expansion pipeline per account
Forecast	The forecast against the actual result at the close of each quarter
Close	Days from verbal yes to signature

Source: Doug's five stage playbooks.

Step by Step

Work the six stages in order, then run the five playbooks. Each step ends with a test, so you know when you're ready to move on.

The Six Stages

Step 1: Trigger

Find the one or two outcomes the buyer must deliver this year.

Who's involved: one executive, or an outside event such as a budget change, a new leader, or a vendor change. The buyer believes something has to change, but not yet how. Tools that carry the data: account research and the CRM.

Ready when: You can name the one or two outcomes the buyer must deliver this year.

Step 2: Build the Group

Find the person who will push inside the company, and give them what they need to explain the case to others.

Who's involved: purchasing, an IT or operations leader, a technical evaluator. The buyer believes someone else should own the risk. Tools: CRM, email and call notes.

Ready when: You've named your champion and given them what they need to explain the case.

Step 3: Shape the Solution

Bring in the right specialists. Tie the design to the outcome the buyer must deliver.

Who's involved: technical specialists, the champion, finance. The buyer is asking whether this fits what they already run. Tools: CRM, quoting, shared documents.

Ready when: The design ties back to the outcome the buyer must deliver.

Step 4: Executive Approval

Build the case in their numbers. Plan every date backward from the approval date.

Who's involved: the CFO and the CIO, and sometimes legal and security. The buyer wants the return and the risk in their own terms. Tools: CRM, forecast view, the business case.

Ready when: You know the approval date, and every other date works back from it.

Step 5: Contract and Start

Keep one owner on the path from yes to signature to first delivery.

Who's involved: legal, purchasing, delivery, billing. The buyer believes terms are final once they sign. Tools: contract tool, e-signature, billing.

Ready when: One named owner covers the path from yes to first delivery.

Step 6: Renewal

Start the renewal plan at signing. Review value with the buyer on a set schedule.

Who's involved: the original champion, finance, often a new executive. The buyer is asking whether they got what they paid for. Tools: customer success platform, usage data, CRM.

Ready when: A renewal plan starts at signing, with reviews on a set schedule.

The Five Playbooks

Step 7: Hunt (win new accounts)

Pick accounts by trigger and fit. Find the executive who has the problem. Reach in through the person closest to the work, then work up.

Tools: account research, CRM, email and call tools. Data that must flow on: the trigger, the contact map (who is in the account and what each person does), and why now. Number to track: days from first qualified signal to first meeting with the person who owns budget.

Ready when: You can show the trigger, the contact map and why now for each target account.

Step 8: Convert (run the deal)

Confirm the outcome. Map everyone who must agree. Set exit criteria for each stage that the buyer has to meet.

Tools: CRM, shared documents, quoting. Data that must flow on: stage, named roles, agreed scope, and the next dated step. Number to track: conversion from each stage, counting only deals where the buyer met the exit criteria.

Ready when: Every deal shows its stage, named roles, agreed scope and a dated next step.

Step 9: Expand (grow the account)

Review value delivered with the buyer. Find the next problem they must solve. Size it before bringing a proposal.

Tools: customer success platform, CRM, billing. Data that must flow on: usage, value delivered, and each new need entered as an open opportunity. Number to track: open expansion pipeline per account.

Ready when: Each new need is entered as an open opportunity, with usage and value delivered on the record.

Step 10: Forecast (call the number)

Check each deal against buyer evidence, not rep opinion. Compare the call to the result.

Count a deal as committed only with a named economic buyer (the person who owns the budget) and a dated next step. Tools: CRM, forecast view. Data that must flow on: deal facts into the forecast, and misses back into the stage rules. Number to track: the forecast against the actual result at the close of each quarter.

Ready when: Every committed deal has a named economic buyer and a dated next step.

Step 11: Close (get to signature and start)

Build a joint plan with the buyer. Work backward from the CFO and CIO sign-off. Put one owner on the paperwork.

Hand the account to delivery and a renewal plan at signing. Tools: contract tool, e-signature, CRM, billing. Data that must flow on: signed terms, start date, renewal date, and the champion, into billing and customer success. Number to track: days from verbal yes to signature.

Ready when: Signed terms, start date, renewal date and champion have reached billing and customer success.

Troubleshooting

Problem	Likely cause	Fix
The signal about an account never reaches the rep who owns it (stage 1)	The signal stays in a research tool	Write each signal to the account record, with the trigger and why now, and route it to the owner the same day.
Contacts and roles live in one rep's head (stage 2)	They were never entered in the CRM	Map everyone who must agree, and record the named roles on the deal.
The quote stops matching the plan (stage 3)	Scope and price change in email	Quote from the CRM record. Send price and scope changes through one approval step with a named owner.
The forecast keeps moving (stage 4)	The approval date is a guess	Plan every date backward from the approval date. Count a deal as committed only with a named economic buyer and a dated next step.

Problem	Likely cause	Fix
Start dates slip and terms don't match (stage 5)	Signed terms are typed again by hand	Pass signed terms to billing as fields, not as a PDF. Check the first invoice against the contract. Keep one owner on the path.
Risk shows up late, with the renewal close (stage 6)	Nobody with the relationship sees account health in time	Start the renewal plan at signing. Send health and risk flags to the CRM record as they change.

Doug can set this up with you. Book a discovery call at mayberryadvisory.com.