



— 2WIN! GLOBAL - DISCOVERY SERIES —

THE DISCOVERY ADVANTAGE

The AI-Powered Playbook for Winning Complex Deals

Most teams are measuring activity. Elite teams are measuring meaning. Here's how to close the gap and turn discovery into your most powerful competitive advantage.

83%

of buyer research
happens without you

2%

performance edge that
compounds into outsized revenue

6

parts to winning
complex deals

You're Losing Deals You Should Be Winning

Somewhere in your pipeline right now, there's a deal that looks healthy. Your champion is engaged. The demo went well. Next steps are scheduled. Your rep marked it 75% likely to close. It's going to die. Not because your product is worse. Not because your team didn't work hard. And not because the buyer chose a competitor with better features.

It's going to die because your team achieved resonance with one stakeholder and the rest of the buying committee never got there.

Here's what that looks like in practice: Your champion is nodding enthusiastically during every call. They're responding to emails. They're telling you the deal is moving forward. But when it's time to build internal consensus — when budget needs approval, when legal has questions, when the VP who wasn't in the room needs to sign off — the deal goes quiet. Your champion is selling alone inside their own organization, armed with your message but surrounded by people who never felt the urgency to change.

"An enthusiastic champion plus a disengaged buying committee equals a dead deal. Every time."

This is the discovery problem most revenue organizations are facing right now, and most don't even know it. They're diagnosing late-stage deal failures as pricing issues, timing problems, or competitive losses. But the root cause is almost always the same: discovery that went deep with one person and wide with no one.

Why This Keeps Happening

The pattern is predictable because it's structural, not behavioral. Most sales teams aren't failing at discovery because their reps are lazy or undertrained. They're failing because their approach to discovery is built on a flawed assumption: that understanding one stakeholder's problem is the same as understanding the organization's motivation to change. It's not.

Consider the typical enterprise deal. Your AE connects with a director-level champion who has a real problem. Discovery goes well — you understand their pain, their timeline, their goals. You build a proposal around what you learned. You demo the solution. The champion loves it.

Then the deal enters the buying committee. The CFO wants to understand financial impact you never discussed. The VP of Operations has concerns about implementation you never surfaced. The end users have adoption questions nobody asked. Your champion tries to translate your message to each of these stakeholders, but they can't — because they don't fully understand what each person cares about either.

The deal doesn't die dramatically. It just slows. Emails take longer to return. Meetings get rescheduled. 'We're still evaluating' becomes the refrain. Three months later, it's marked closed-lost, and the post-mortem blames 'budget constraints' or 'shifting priorities.' But the real cause was single-stakeholder resonance. Your message matched the motivation of one person. The rest of the room never moved.

THE STAKES ARE HIGHER THAN A LOST DEAL

Multi-stakeholder resonance isn't just a closing strategy..

This problem is getting worse, not better. The shift toward usage-based pricing, consumption models, and outcome-driven contracts means the deal doesn't end at signature. If the organization doesn't adopt your solution – if stakeholders aren't energized and committed to driving change – the revenue doesn't stick. Renewals fail. Expansion stalls.

That changes the math on discovery entirely. It's no longer enough to convince a buying committee to say yes. You need to understand how the organization will actually adopt the solution, who will drive usage, and what has to change operationally for the investment to succeed.

"Multi-stakeholder resonance isn't just a closing strategy anymore. It's a retention strategy, an expansion strategy, and a revenue durability strategy. Teams that figure this out will win twice: once at close, and again at renewal."

PART 2 OF 6 · WHAT'S HAPPENING IN THE BUYER'S BRAIN

The Chemistry of Decision-Making

Before we talk about methodology, we need to talk about biology. Humans cannot make decisions without emotion. This is not a metaphor. Neuroscience research has shown that damage to the brain regions responsible for emotional processing doesn't make people more rational – it makes them unable to decide at all. Emotion isn't the enemy of good decision-making. It's the engine.

Oxytocin

THE TRUST CHEMICAL

Spikes when a buyer feels genuinely understood – when you reference something specific they told you, validate their concerns, and demonstrate you've done your homework. Creates the safety that allows honest answers. Without it, you get polite, guarded responses that tell you nothing useful.

Cortisol

THE STRESS HORMONE

Rises with uncertainty, risk, and fear. A small spike creates urgency – the motivation to solve the problem. Too much, and the buyer shuts down entirely. Their brain shifts into self-protection mode, and the conversation is over.

Serotonin

THE SATISFACTION SIGNAL

Releases when a buyer envisions a positive future – when they can see themselves succeeding and believe they're making a smart, confidence-building choice. Serotonin is the chemistry of optimism – it's what moves a buyer from "this is interesting" to "we need to do this."

WHY THIS MATTERS FOR DISCOVERY

Most discovery training teaches you to ask better questions. That's necessary but insufficient. The deeper skill is understanding what your questions are doing to the buyer's brain – and learning to guide that chemistry intentionally. When you surface the real risks of inaction, you're activating cortisol. When you use specific recall, you're building oxytocin. When you paint a concrete picture of success, you're triggering serotonin.

GREAT DISCOVERY ALIGNS WITH BRAIN CHEMISTRY

ACTIVATE OXYTOCIN

Use validating language and specific recall to create trust and safety.

INTRODUCE CORTISOL

Surface real risks, missed targets, inefficiencies, lost revenue – to activate motivation.

ESTABLISH SEROTONIN

Paint a picture of a calmer, more confident, more successful future state.

Resonance: The Goal of Every Discovery Conversation

Before we get into frameworks and techniques, we need to name the thing you're actually trying to achieve. It's not information. It's not qualification. It's not even 'understanding the buyer.' It's resonance.

Resonance is what happens when your message matches the specific motivation of a stakeholder — when what you're saying connects so precisely to what they care about that they shift from passive interest to active support. They stop being an audience member and start being an advocate.

The problem is that most sales teams achieve resonance with one person and mistake it for progress. Your champion resonates with your message because you built the message around their perspective. But the CFO has different motivations. The operations leader has different concerns. The end users have different priorities. One message cannot create resonance with all of them.

Multi-stakeholder resonance is the goal. It means every key player in the decision has a reason to move — not because your champion convinced them, but because your discovery uncovered what matters to each of them, and your strategy addresses it directly.

Without multi-stakeholder resonance, you're dependent on your champion's ability to sell internally — which means you've handed your deal strategy to someone who may not fully understand what their own colleagues care about. That's not a strategy. That's hope.

"The frameworks that follow are designed to achieve multi-stakeholder resonance systematically — giving you the tools to uncover what each stakeholder cares about and build a strategy that creates movement across the entire buying committee."

THE CDIM™ FRAMEWORK

The Framework That Makes Discovery Persuasive

Most discovery frameworks are designed for qualification: budget, authority, need, timeline. Those questions matter. But they're table stakes. They tell you whether the deal is real. They don't tell you how to win it.

CDIM™ (Current, Desired, Impact, Metrics) is a different kind of framework. It's not a qualification tool. It's a persuasive model that helps you understand how buyers think about a problem, so you can align multiple stakeholders around a vision they care enough about to act on.

CDIM isn't a checklist you work through. It's a conversation structure. The power isn't in the questions themselves, it's in consciousness: knowing where you are in the framework at any moment, so you can make strategic choices about where to go next.

Current

WHERE ARE THEY TODAY?

Not just "What's the problem?" but "What's happening right now that made this a priority?" AI can surface the context. Your job is to connect it to the person in front of you. Current state builds oxytocin – the trust that makes everything else possible.

ASK

"What does that mean for your team specifically?"

C

Desired

WHERE DO THEY WANT TO BE?

Vague goals create stalled deals. Concrete outcomes create urgency. Push past "accomplish" into specific, measurable terms for what success actually looks like. When the desired state comes from them, they own it. Ownership creates momentum. Evaluation creates delay.

ASK

"If we solve this, what changes for you in 90 days?"

D

Impact

WHERE MOST DISCOVERY DIES

This is where most discovery dies. Reps stop at the problem without uncovering the ripple effect. Impact is where emotion lives: board pressure, burned out teams, lost competitive position. Use impact stacking to move up the Value Pyramid.

ASK

"What happens if this doesn't get solved?"

I

Metric

HOW WILL WE MEASURE SUCCESS?

Deals without metrics die in committee. Metrics create accountability, justify investment, and make it easier for your champion to build internal consensus. Tracked metrics reveal real priorities. Hypothetical metrics reveal wishful thinking.

ASK

"What numbers need to move for this to be considered a win?"

M

"CDIM™ isn't a checklist. It's a conversation structure. And the power is in consciousness – knowing where you are in the framework at any moment."

Moving Up the Value Pyramid

The technique that unlocks impact is called impact stacking: asking "what does that enable?" repeatedly, moving up through layers of organizational value until you reach the level that justifies executive action. Here's how it works:

IC LEVEL

"It would save our team about five hours a week on manual data entry."

MANAGER LEVEL

"We could handle our current pipeline without the two additional hires we've been requesting."

EXECUTIVE LEVEL

"It directly supports our EBITDA targets. The CEO has made clear we're scaling revenue without scaling costs."

THE VALUE PYRAMID

EXECUTIVES

Strategic initiatives, market position, organizational outcomes. They own the business result.

MANAGERS

Team performance, operational efficiency, departmental metrics. They own the process that's broken.

INDIVIDUAL CONTRIBUTORS

Daily tasks, tool usability, personal productivity. They experience the problem most directly.



"Impact stacking is how you move up the Value Pyramid deliberately — speaking to the IC in their language, the manager in theirs, and the executive in theirs. That's the foundation of multi-stakeholder resonance."

CONSCIOUSNESS · THE SKILL THAT SEPARATES FRAMEWORK USERS FROM MASTERS

There's a progression every professional goes through when learning CDIM. At first, they follow it mechanically: current, desired, impact, metrics. It works, but it feels like a script.

The next level is awareness — knowing where you are in the framework at any moment. The expert level is what 2Win calls consciousness. That's when you can hear a response, immediately recognize what level of the Value Pyramid it belongs to, identify gaps, and make a strategic choice about where to take the conversation next.

Consciousness is what makes CDIM a conversation structure instead of a checklist. It's the difference between a musician reading sheet music and a musician improvising — both use the same notes, but one is responding to what's happening in the room in real time.

THE WIN PLAN · TURNING DISCOVERY INTO STRATEGY

Turning Discovery Into Strategy

Here's where most discovery efforts break down, even good ones. The team conducts thorough CDIM discovery. They uncover real impacts at multiple levels. They have metrics. They understand the stakeholders. And then nothing changes about how they approach the deal. The discovery lives in notes and transcripts. It informs individual conversations but never gets synthesized into a strategy.

A Win Plan is not a deal management artifact. It's a leadership framework — a tool that helps you synthesize the most important information from discovery into a strategy for how you're going to interact with stakeholders to drive decision-making alignment and help lead them toward their goals.

CDIM gives you the insight. The Win Plan gives you the strategy for how to use that insight to influence, align, and lead. It requires you to internalize what you've heard, decide what's most important, and articulate a clear thesis about how this customer achieves their goals.

THE WIN PLAN CONNECTS FOUR LEVELS OF UNDERSTANDING

STRATEGIC INITIATIVE

The executive-level business objective your solution supports — the "why this matters to the business" anchor. Comes from impact stacking, public statements, and executive conversations.

IMPROVEMENT STRATEGIES

The major approaches the organization takes to achieve the initiative. A company growing EBITDA might pursue cost reduction, revenue acceleration, and operational efficiency simultaneously.

IMPACT AREAS

The specific, measurable changes your solution enables — the outputs of your CDIM discovery. The impacts and metrics that stakeholders told you matter.

CAPABILITIES

What your solution actually does, connected directly to each impact area. Not a feature list — a targeted set of capabilities that map to the customer's stated priorities.

The Win Plan also connects discovery to everything that comes next: it structures your demo around the customer's priorities, aligns your entire revenue team around a common strategy, and gives your executive sponsor talking points for peer-to-peer conversations. Every touchpoint is intentional.

Discovery Is Continuous

One of the most common misconceptions about discovery is that it's a phase — something that happens at the beginning of a deal and then ends. In reality, discovery is a continuous process that evolves as your understanding deepens and the deal progresses. There are three phases worth distinguishing, not because they're separate activities, but because each phase has a different purpose.

PHASE 1

Qualification Discovery

IS THIS DEAL REAL?

Early discovery is about determining fit. Does this buyer have a problem you solve? Is there genuine urgency? Are the right stakeholders involved? This is necessary, but it's the phase most teams over-index on. They treat qualification as the finish line rather than the starting line. The result is deals 'qualified' on surface-level criteria but lacking the depth required to actually win.

PHASE 2

Deal-Shaping Discovery

HOW DO WE WIN THIS?

Once you know the deal is real, discovery shifts to strategy. What's driving urgency? Who else needs to be convinced? What criteria will they use to decide? What could derail this internally? This is where CDIM, impact stacking, and the Win Plan earn their keep. Deal-shaping discovery is about building the understanding you need to lead the deal — not just participate in it.

PHASE 3

Deal-Closing Discovery

WHAT'S STANDING IN THE WAY?

Even in late-stage deals, discovery isn't finished. Closing discovery surfaces the concerns, risks, and objections that haven't been voiced yet. "What could prevent this from happening?" and "What would need to be true for you to feel confident?" This is where deals are saved or lost. The team that's still discovering at this stage is the team that catches the concern that would have killed the deal in committee.

"Treating discovery as a continuous discipline, not a one-time event, changes how your team approaches every conversation. Discovery isn't something you do before the demo. It's something you do throughout the entire engagement."

Beyond the Co-Pilot Metaphor

Most of the conversation about AI in sales follows a familiar script: AI is your co-pilot. It takes notes so you can make eye contact. It summarizes calls so you can move faster. That framing was useful in 2023. It's insufficient now.

The real opportunity isn't AI as an assistant. It's humans and agents operating together from a common methodology. When you train the human on CDIM and you train the agent on CDIM, they're working from the same playbook. The agent doesn't just summarize, it surfaces insights through the framework. The output is better than either could produce alone.

The teams that will win in the next era of sales aren't the ones that use AI to work faster. They're the ones that embed a shared methodology into both their people and their technology, creating a system where humans and agents reinforce each other at every stage.

BEFORE THE CALL

Building a Point of View

The old approach: skim LinkedIn, check the website, walk in with generic questions. The new approach: AI trained on your methodology frames research through CDIM before you ever speak to the buyer. The agent synthesizes an earnings call, a leadership change, and an industry trend into a hypothesis. That's not a research brief. That's a point of view. And walking in with a point of view changes the quality of the conversation entirely.

DURING THE CALL

Navigating the Conversation

The human navigates. They read the room. They hear the hesitation before an answer, the energy shift when they hit a nerve. They calibrate how much cortisol to introduce without triggering defensiveness. They build the emotional safety that makes a buyer willing to share what's really at stake. While the human is navigating, the agent is tracking CDIM coverage and surfacing awareness that helps the human make better choices.

AFTER THE CALL

From Transcript to Strategy

An agent trained on your methodology maps what was uncovered against the Win Plan. It identifies the strategic initiative confirmed, the impact area still a hypothesis, the stakeholder not yet reached. It doesn't just tell you what was said — it tells you what's missing. Over time, across hundreds of conversations, the agent identifies patterns: which questions open buyers up, what separates wins from losses.

"One call gives you data. A library of calls analyzed through a shared methodology gives you strategy. AI sharpens your perspective after the call. It doesn't replace it."

Your 30-Day Discovery Playbook

You don't need to overhaul your entire sales process to start improving discovery. You need to change one behavior, master it, and then layer in the next. Here's a four-week plan that any revenue team can start running on Monday.

WEEK 1

Diagnose Where Your Deals Are Actually Dying

- › Pull your last 10 closed-lost deals and 5 longest-stalled opportunities
- › For each: how many stakeholders did you conduct real discovery with?
- › Could you articulate what each stakeholder cared about in their own words?
- › Identify the pattern: single-stakeholder discovery that wasn't broad enough

WEEK 2

Introduce CDIM to One Live Opportunity

- › Pick a mid-stage deal — past qualification but before proposal
- › Structure your next discovery conversation around CDIM
- › Pay particular attention to impact stacking: ask "what does that enable?"
- › Debrief: what did you learn that you wouldn't have uncovered before?

WEEK 3

Build a Win Plan Hypothesis

- › Take the Week 2 deal and answer four questions on a single page
- › What's the strategic initiative? Improvement strategies? Impact areas? Capabilities?
- › Mark what you know vs. what you're guessing — the guesses become your discovery agenda
- › Share with everyone on your team who touches this deal

WEEK 4

Add the Human-Agent Layer

- › Take stock of the AI tools your team already has access to
- › Before the next call: use AI to build a pre-call CDIM hypothesis
- › During the call: stay present — let AI handle the record
- › After the call: ask what's still missing from the Win Plan

WHAT COMES NEXT

Small, intentional improvements compound. After four weeks, you'll have a clearer picture of where your discovery has been falling short, practical experience with CDIM, a Win Plan hypothesis you can test and refine, and a workflow for integrating AI into your preparation and debriefs. The frameworks in this ebook become transformational when they're embedded across an entire revenue team — when every AE, SE, and manager is operating from the same methodology, and when discovery stops being a set of tips and becomes a system. That's the broader transformation. And it starts with a conversation.

READY TO GO DEEPER?

Stop Losing Deals You Should Be Winning.

This ebook gives you a playbook you can start running today. But if you recognize the patterns we've described — deals dying in late-stage, single-stakeholder resonance, discovery that doesn't translate into strategy — and you want to address it at the team or organizational level, we'd like to help. Request a free consultation with a 2Win advisor. No pitch, no pressure. Just a discovery conversation, the same kind we teach, about where your team is today, where you want to be, and what's standing in the way. We'll give you an honest assessment and practical recommendations whether or not you ever become a customer.

[REQUEST YOUR FREE CONSULTATION](#)

Discovery2Win® has trained tens of thousands of practitioners across some of the world's most complex sales organizations. Our methodology — CDIM™, the Value Pyramid, impact stacking, Win Plans — is battle-tested in the rooms where deals are actually won and lost. Our approach to AI-powered discovery isn't theoretical. We're actively embedding these frameworks into the tools modern revenue teams already use. If you're ready to stop losing deals you should be winning, let's talk.

Discovery2Win®

Revealing. Validating. Impactful. Differentiating.

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Facilitation throughout North America, EMEA, Latin America, and APJ