

FIVE STAGES

ASSESSMENT

Every customer you have is standing somewhere on the same road: Win, Transition, Stabilize, Expand, Renew. This assessment runs the exercise from Chapter 7 on your single largest account – walk it down the road, one stage at a time, and mark where confidence got built and where it got spent. Don't average, don't round up, don't give yourself credit for intentions. Roads tend to leak at the same seam every time. This will tell you which one.

BEFORE YOU START

Name the account you're walking down the road. Use your single largest account – the one you cannot afford to lose.

Account

Remember what each stop is answering:

- The Five Stages answer WHERE the customer is.
- The Seven Laws answer HOW you behave at every stop.
- This assessment is about WHERE – use it to find the seam, then use the Outcome Execution Gap Worksheet to work the seam itself.

STOP 1 – WIN

Sales and Delivery align before any commitment gets made, so what gets sold matches what you can deliver and what the customer will count as a win.

Is this true on your largest account right now?

- ☐ Delivery reviewed or helped shape this deal before it was sold – not after.
- ☐ What Sales sold matches what Delivery can actually support.
- ☐ There is a written definition of what this customer will count as a win, in their words.

Who owns this stage today?	
Stage health (circle one)	1 2 3 4 5
Where confidence got BUILT here	
Where confidence got SPENT here	

STOP 2 – TRANSITION

Knowledge, expectations, relationships, and accountability move from Sales to Delivery without losing context.

Is this true on your largest account right now?

- ☐ Delivery joined before the kickoff, not two weeks after the deal closed.
- ☐ The customer's actual expectation was handed to Delivery directly – not reverse-engineered from a signed SOW and email threads.
- ☐ Sales, Delivery, and the customer were in the same room for the handoff.

Who owns this stage today?	
Stage health (circle one)	1 2 3 4 5
Where confidence got BUILT here	
Where confidence got SPENT here	

STOP 3 – STABILIZE

Execution becomes predictable, everyone agrees on what success actually means, unnecessary friction goes away, and confidence starts to build.

Is this true on your largest account right now?

- ☐ Delivery is measuring itself against a shared definition of success, not just its own scorecard.
- ☐ Unnecessary friction (slow approvals, unclear ticket routing, repeated status-chasing) has been identified and removed.
- ☐ The account team would say customer confidence is visibly rising at this stage, not just tickets closing.

Who owns this stage today?	
Stage health (circle one)	1 2 3 4 5
Where confidence got BUILT here	
Where confidence got SPENT here	

STOP 4 – EXPAND

Earned confidence turns into a wider footprint, stronger executive relationships, and new business.

Is this true on your largest account right now?

- ☐ This account has added scope, seats, or services in the last 12 months.
- ☐ The customer brings you new problems to solve before you have to pitch for them.
- ☐ Your day-to-day contacts advocate for you with other stakeholders in their organization.

Who owns this stage today?	
Stage health (circle one)	1 2 3 4 5
Where confidence got BUILT here	
Where confidence got SPENT here	

STOP 5 – RENEW

The partnership continues, because renewal was earned in every interaction since Day One.

Is this true on your largest account right now?

- ☐ You could predict this renewal's outcome today, without waiting for the meeting.
- ☐ There is a check-in cadence that would surface expectation drift long before the renewal conversation.
- ☐ No one on this account has been surprised by a renewal decision in the past two years.

Who owns this stage today?	
Stage health (circle one)	1 2 3 4 5
Where confidence got BUILT here	
Where confidence got SPENT here	

Read the road

Look at the five stage-health scores together, not one at a time.

- Every stage 4 or 5 — protect this account like it's the most valuable thing you own. It is.
- One stage clearly lower than the rest — that's your seam. It's costing you more than any other single fix would.
- Scores fall as you move right (Win high, Renew low) — confidence is being built at the start and spent everywhere after. Look hardest at Transition.
- Scores are low everywhere — this isn't a stage problem. It's an ownership problem: nobody is carrying the whole road.

Decide what happens next

Which stage scored lowest, and who owns it today?

What is the one change, this week, that would raise that score by one point?

If nobody currently owns the transitions between stages, who should?

Want an outside eye on this? Book your Outcome Execution Gap Session — we'll map this exact road on one or two of your real accounts together.

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