EOS Core Process: Objection Handling and Negotiation

Process Owner: [Person from EOS Accountability Chart]
Last Updated: [Date]
Review Date: [Next quarterly review date]

EOS Integration

Connected EOS Tools:
Related EOS Rocks: [Current quarter Rocks that improve this process]
EOS Scorecard Metrics: [Weekly numbers tracked for this process]
Accountability Chart Connection: [Which seat owns this process]

Process Overview

Purpose: To systematically address customer concerns and objections while maintaining relationship trust, ultimately converting hesitation into commitment through value-focused responses and strategic negotiation.

High-Level Steps

1. Objection identification and categorization
2. Active listening and validation
3. Clarifying questions and root cause analysis
4. Response strategy selection
5. Value-based response delivery
6. Confirmation and agreement
7. Documentation and learning
8. Prevention strategy development

Core Process Detailed Steps

Step 1: Objection Identification (2 minutes)
- Listen completely without interrupting
- Categorize objection type (price, features, timing, authority, need)
- Note emotional tone and urgency
- Identify if it's a real objection or request for more information

Step 2: Active Listening and Validation (3 minutes)
- Acknowledge their concern as valid
- Use phrases like "I understand" or "That's a fair point"
- Repeat back what you heard to confirm understanding
- Show empathy for their situation

Step 3: Clarifying Questions (5 minutes)
- Ask open-ended questions to understand the root cause
- "Help me understand what's driving that concern"
- "What would need to change for this to work?"
- "What's your experience been with similar solutions?"
- Probe for the real issue behind the stated objection

Step 4: Response Strategy Selection (1 minute)
- Choose appropriate response method:
  - Feel, Felt, Found technique
  - Boomerang (turn objection into selling point)
  - Question the objection
  - Provide evidence/proof
  - Offer alternative solution
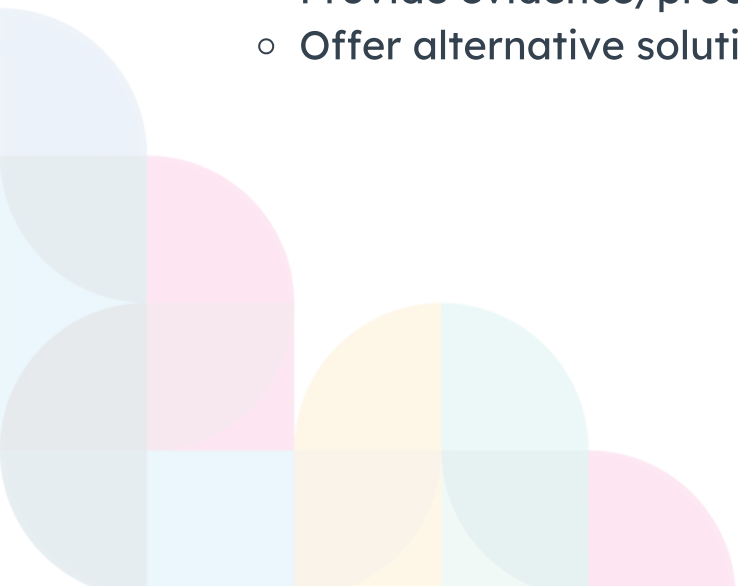
Core Process Detailed Steps (cont.)

Step 5: Value-Based Response (5-10 minutes)
- Connect response to their specific pain points
- Use relevant case studies or examples
- Quantify the cost of not solving the problem
- Reframe objection in context of overall value
- Provide options rather than single solution

Step 6: Confirmation and Agreement (2 minutes)
- Ask if your response addresses their concern
- "Does that help address your concern about...?"
- Get explicit confirmation before moving forward
- Don't assume silence means agreement

Step 7: Documentation (5 minutes)
- Record objection and response in CRM
- Note what worked and what didn't
- Share with team if it's a new objection type
- Update objection response library

Step 8: Prevention Planning (10 minutes)
- Analyze patterns in objections received
- Update qualification process to surface objections earlier
- Improve proposal/presentation to preempt common objections
- Train team on new objection response techniques

Quality Standards & Success Metrics

Must-Have Standards:
[ ] Standard 1 (measurable)
[ ] Standard 2 (measurable)
[ ] Standard 3 (measurable)

EOS Scorecard Metrics:
Weekly Metric 1: [Target number]
Weekly Metric 2: [Target number]
Monthly Metric: [Target number]

Accountability:
- Sales Rep: Handles objections in real-time, documents responses
- Sales Manager: Coaches on objection handling, reviews difficult cases
- Marketing: Provides supporting materials and case studies
- Product Team: Addresses feature-related objections and feedback

Frequency:
- Applied during every customer interaction as objections arise
- Weekly review of objection patterns and responses
- Monthly team training on new objection handling techniques

Sample Success Metrics (adjust for your team + create Scorecards):
- Objection resolution rate (target: >80%)
- Time to address and resolve objections (target: same call/meeting)
- Conversion rate after objection handling (target: >50%)
- Number of objections per deal (decreasing trend)
- Team confidence score in handling common objections

Process Connections

Receives From: [Which EOS core process feeds into this one]
Hands Off To: [Which EOS core process this feeds into]
Dependencies: [Other processes or resources needed]

Tools & Resources

Required Systems/Tools:

Tool 1

Tool 2

Template/Document links

Training Materials:

Link to training video

Link to detailed SOPs (if needed)

Onboarding checklist

Troubleshooting & Common Issues

If [Problem], Then [Solution]:

Problem 1 → Solution 1

Problem 2 → Solution 2

Problem 3 → Solution 3

Escalation: [When to involve process owner or leadership team]

Process Improvement

Last Quarter's Improvements: [What was changed and why]
Current Issues to Address: [Items for next EOS Rock or Level 10 discussion]
Issue 1
Issue 2

Ideas for Next Quarter: [Potential improvements to consider]

Approval & Sign-Off

Process Owner Approval: [Name + Date]
Leadership Team Review: [Date reviewed in Level 10 or quarterly]
Next Review Date: [Align with EOS quarterly cycle]

Quick Reference Card

[One-page summary of key steps for daily use]

The 5 Key Steps:

[Step 1 summary]
[Step 2 summary]
[Step 3 summary]
[Step 4 summary]
[Step 5 summary]

Key Metrics: [2-3 most important numbers to track]

Emergency Contacts: [Who to call if process breaks down]