

CARVE

SELLING

VOLUME 01 / SALES FIELD NOTES

THE AE FIELD GUIDE

From booking meetings to closing deals.

For SDRs stepping up and AEs sharpening their craft.

FIND YOUR LINE.

2026 / 01

THE LINEUP

A field guide for your next move.

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A practical teaching framework. Fictional scenarios; no guaranteed outcomes.

FIND YOUR LINE.

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CARVE SELLING — THE AE FIELD GUIDE

A practical guide to discovery, qualification, demonstrations, negotiation, and closing

This playbook teaches a relationship-driven, evidence-led approach to selling:

Understand the buyer. Make the opportunity tangible. Reduce uncertainty. Agree on the next step.

All people, companies, products, and scenarios below are fictional. The eight-stage deal framework is an organizing method created for this playbook, not an externally validated sales methodology.

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1. The eight-stage deal framework

Use the eight stages throughout the buying process. It is a checklist for understanding and advancing a deal, not a rigid script.

Study the account / Enter with relevant context. / Verified history, stakeholders, and a useful hypothesis.

Explore the problem / Understand what needs to change. / A specific problem, its consequences, and the current workaround.

Test qualification / Establish whether a viable buying process exists. / Budget path, authority, urgency, and decision process.

Shape the solution / Recommend a proportionate starting point. / Agreed scope, success measures, and implementation requirements.

Highlight the value / Make the business case understandable. / Buyer-validated benefits, costs, assumptions, and risks.

Obtain mutual commitment / Turn interest into accountable action. / A next step with an owner, date, and purpose.

Resolve commercial friction / Address terms without unnecessary concessions. / Confirmed blockers, conditional trades, and clear economics.

Execute the handoff / Deliver what was sold. / Correct agreement, commercial milestones, and a documented transition.

A deal advances when buyer evidence improves, not merely when the seller completes an activity.

A demonstration is an activity. A buyer agreeing that the demonstrated workflow solves a priority problem is evidence.

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2. Study the account

Prepare to be relevant, not omniscient

Before a conversation, establish:

- What the organization does.
- Why this person might care.
- What the buyer has actually said.
- What has already been offered or promised.
- Which stakeholders are involved.
- What remains unknown.

Build a simple preparation note:

Known: Facts supported by recent correspondence or reliable records. Hypothesis: A possible problem worth testing. Unknown: Questions that could change the recommendation.

Example:

Known: The company has opened three locations.

Hypothesis: Its reporting process may not have scaled with the expansion.

Unknown: Whether reporting is a meaningful operational problem or simply an inconvenience.

Do not turn a hypothesis into a claim:

“With the new locations, has reporting become harder to manage?”

Not:

“Your expansion has clearly created reporting problems.”

Verification rules

Never confuse:

- A proposed meeting with an accepted meeting.
- A sent proposal with an approved budget.
- An enthusiastic contact with an authorized buyer.
- A signed agreement with collected payment.

- Historical performance with results caused by your solution.

Practice

You find a note saying, “Interested in enterprise plan.” The latest email says, “We need to evaluate this next quarter.”

What should the next outreach do?

Example answer

Acknowledge the timing and ask what evaluation or budgeting event should determine the next conversation. Do not describe the enterprise plan as selected.

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3. Explore the problem

Discover the operational story

A useful discovery conversation explains:

- 1. What happens today.
- 2. Where it breaks down.
- 3. Who feels the consequences.
- 4. What the consequences cost.
- 5. Why the organization might change now.

Move from broad questions to concrete examples:

“Walk me through how this works today.”
“Where does the process slow down?”
“Can you give me a recent example?”
“What happened as a result?”
“What have you already tried?”
“If nothing changes for six months, what happens?”

Avoid collecting pain points that never connect to a business decision.

Annotated discovery call

Scenario: A seller offers workflow software to a multi-location services company.

Seller: Thanks for making time. I’d like to understand how your team handles reporting, then decide whether a demonstration would be useful. What prompted you to take the meeting?

Buyer: We spend too much time chasing updates from locations.

Seller: What does that look like in a normal week?

Buyer: Managers send spreadsheets. Someone consolidates them, follows up on missing information, and prepares a summary.

Annotation: The seller asks for the workflow rather than immediately pitching automation.