THE CHAMPION KIT **a note for founders**

From Louie Bernstein, Fractional Sales Leader · louiebernstein.com

Why your reps need this *The deal is won or lost when you are not in the room*

- Your reps find someone inside the account who likes them. Then they wait.
- That person walks into a meeting your rep never attends. No numbers. No answers. That's where the deal dies.
- This kit puts the case on one page, in the champion's own words. Now they can sell for you when you're not there.
- And you stop being the one who has to show up to save the deal.

Is it a real champion? *Actions, not titles*

- A real champion shares inside information, sets up meetings with the other people who decide, and warns you when the deal is in trouble.
- Someone who takes your calls, likes you and never introduces you to anyone else is not a champion. Find another one.

How to roll it out *Make it part of your playbook*

- Give pages 2 and 3 to every rep.
- The rep fills in the kit after discovery. The champion corrects the numbers and the wording.
- Rep and champion rehearse for 20 minutes: "Who will push back, and what will they say?"
- The rep debriefs with the champion the same day as the internal meeting.
- Log the kit, the champion and the meeting date in your CRM. Review open kits in your weekly pipeline meeting.

What's inside *Four pages*

- Page 1: this note.
- Page 2: the blank Champion Kit. Your rep copies it for each deal.
- Page 3: rep notes on how to fill it in.
- Page 4: a finished example, using my own business.

From Louie: *If you're still the champion in every deal your company wins, that's the problem I fix. louiebernstein.com*

CHAMPION KIT for [customer] evaluating [your company]

Everything you need to make the case inside your company. Forward it, quote it, change any word that doesn't sound like you.

Customer	*Company · size · what they use or do today*	**Prepared for**	*Champion: name and title*
Prepared by	*Rep name, your company*	**Internal meeting**	*Date · who decides (name and title)*

1 The problem *Your champion's words, not yours*

Two sentences your champion would say to their boss, in their words from discovery. Include one date or number that makes it urgent. See the rep notes on page 3.

2 The cost of doing nothing *Your champion's numbers*

What it costs today	Per year	Where the number came from (champion's source)
Time their people spend on the problem today	$	*Hours a month × loaded hourly rate*
Revenue lost or delayed	$	*Deals, orders or customers at risk × value*
Workarounds they pay for now	$	*Last 12 months of invoices*
Risk if nothing changes	$	*The audit, deadline, renewal or event that forces a decision*
Total cost of doing nothing	**$**	*Use the champion's math, even if it's lower than yours. They can defend their own numbers.*

3 Answers for everyone who has to say yes *One short answer per person*

Who	Name	What they'll ask	Short answer
Economic buyer		*Why this, and why now?*	*One or two sentences. Tie it to the cost in section 2.*
Finance		*What do we pay, and what do we get?*	*Price, term and what they keep. Compare it to the cost of doing nothing.*
The team who uses it		*Who does the extra work, and will people use it?*	*Who does the work in the first 30 days, and what gets easier for them.*
The skeptic		*What happens if this doesn't work?*	*The honest answer: how you'll know early, and what happens then.*
IT / technical		*Where does it live, and who has access?*	*Confirm the details with your technical team before you write this.*

4 The plan from yes to live *Owners and dates*

Step from yes to live	Owner	Target date
Internal meeting / decision	*Champion*	
Agreement signed	*Decision maker + rep*	
Kickoff: goals, people, access	*Champion + your team*	
First result delivered	*Your team*	
Rollout to the people who use it	*Champion + your team*	
90-day review: what changed, what is working, what is next	*Champion + rep*	

5 How to bring us in *Any time*

Call me whenever you're stuck. You never have to bluff.

- Join your internal meeting as backup, or listen by phone
- Bring an expert from our team to answer the technical questions
- Answer any question by email within one business day
- Meet your decision maker for 20 minutes

Name
Phone
Email
Check-in if it stalls *Agreed date*

For the salesperson: *Fill this in from discovery (the first meeting), then have your champion correct the numbers and wording. Rehearse for 20 minutes ("Who will push back, and what will they say?") and debrief the same day. Delete this line before sending.*

Sales Rep Notes **internal only. Delete before sending**

How to fill in the Champion Kit. Use the champion's words over these whenever you have them.

A - How to fill in each section *One row per section*

Section	What good looks like	Common mistake
1 The problem	Two sentences in the champion's words, with one date or number.	Writing your pitch instead of their problem
2 The cost	The champion's math, with a source for every line.	Using your ROI calculator. They can't defend your numbers.
3 The answers	One row for each person in the room. One or two sentences each.	Leaving out the person most likely to say no
4 The plan	Real owners and real dates, agreed with the champion.	Dates you made up to create urgency

B - Who is in the room *Fill section 3 for the people who will actually be there*

Small company	Often one person: the owner. Keep the kit short; go straight to section 4 and get a date.
Mid-size company	The champion is a manager or director. The economic buyer is the VP or owner who signs.
Larger or investor-backed	More approvals: champion, department head, finance, then the CEO or board. Add a row in section 3 for each one.

C Keep it honest *This is where deals and renewals go wrong*

- Sell what the customer needs. A deal the customer would not choose after doing the math is a cancellation at the first renewal.
- Let the champion's numbers stand, even when they're lower than yours.
- Confirm delivery dates with your team before you put them in section 4.
- Never put a claim in the kit you can't prove. The champion's name is on it now.
- Log the kit, the champion, the meeting date and the next step in your CRM the same day.

CHAMPION KIT Example: Northline Software evaluating Louie Bernstein

A finished example. The seller is Louie Bernstein, Fractional Sales Leader. The champion is the COO of a $4M software company.

Customer	*Northline Software · $4M ARR · 5 reps · founder closes 70% of deals*	**Prepared for**	*Dana Ruiz, COO (champion)*
Prepared by	*Louie Bernstein, Fractional Sales Leader*	**Internal meeting**	*March 12 · decides: Sam Patel, founder/CEO, with the lead investor*

1 The problem *Your champion's words, not yours*

"Sam still closes 70% of our deals, and our reps wait for him to step in. If we hire a VP of Sales before we have a written process, we're betting $300,000 on a guess."

2 The cost of doing nothing *Your champion's numbers*

What it costs today	Per year	Where the number came from (champion's source)
Founder hours spent selling instead of running the company	$78,000	*15 hours a week × 52 × $100 an hour (Dana's estimate)*
Deals lost or stalled with no process or follow-up	$240,000	*8 deals lost last year × $30,000 average deal*
A sales hire who didn't work out	$150,000	*Last rep hire: 9 months of salary + recruiter fee*
New reps ramping slowly with no playbook	$60,000	*2 new reps × 3 extra months × $10,000 monthly quota*
Total cost of doing nothing	**$528,000**	*Dana's math. Lower than Louie's, and she can defend every line.*

3 Answers for everyone who has to say yes *One short answer per person*

Who	Name	What they'll ask	Short answer
Founder / CEO	Sam Patel	*Why not hire a VP of Sales now?*	A VP needs a written, proven process to run. Louie builds that first, so our next sales leader walks into a system, not a guess.
Finance	Lee Chen	*What do we pay, and what do we get?*	$14K a month for 12 weeks, 20 to 35 hours a week: $42,000. A full-time VP of Sales costs $250K to $400K a year. We keep the playbook, the pipeline stages and the hiring plan.
Sales team	5 reps	*Who does the extra work, and will this change how I sell?*	Louie meets each rep one-on-one first, then builds the process with them. Reps get clear stages, clear accountabilities and fewer surprises.
Lead investor	Kim Ortiz	*Has he done this before?*	Five decades in sales. Founded MindIQ in 1986, bootstrapped it for 22 years and made the Inc. 500. LinkedIn Top Voice. References on request.
CRM owner	Dana Ruiz	*What happens to our CRM?*	Louie works inside the CRM we have. He cleans up stages, fields and reports so the pipeline tells the truth.

4 The plan from yes to live *Owners and dates*

Step from yes to live	Owner	Target date
Internal meeting / decision	*Dana*	Mar 12
Agreement signed (12 weeks, $14K a month)	*Sam + Louie*	Mar 19
Kickoff: goals, current numbers, CRM access	*Dana + Louie*	Mar 26
One-on-one interviews with each rep and with Sam; findings shared	*Louie + sales team*	Weeks 1–3
Playbook, pipeline stages, CRM cleanup, Accountabilities Document and hiring plan delivered	*Louie + Dana*	Weeks 4–10
12-week review: what changed, what runs without Sam, what is next	*Dana + Louie*	Week 12

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- Join your internal meeting as backup, or listen by phone
- Share references from founders I've worked with
- Answer any question by email within one business day
- Meet Sam or the lead investor for 20 minutes

Name
Phone
Email
Check-in if it stalls *Agreed date*

Example only: *Names, numbers and dates are made up to show how a finished kit reads.*