

RAMI DANOUS

ACCOUNT EXECUTIVE SALES PORTFOLIO

B2B Sales | Business Development | Account Management | Consultative Selling

FROM PROSPECTING TO CLOSED WON

A practical demonstration of how I approach account research, prospecting, discovery, qualification, solution selling, objection handling, pipeline management, negotiation and closing.

PORTFOLIO PURPOSE

This portfolio is a simulated sales project created to demonstrate my approach to a modern B2B Account Executive sales cycle. The company, opportunity and commercial figures used in the mock deal are illustrative.

01. ABOUT ME

Commercial experience applied to modern B2B technology sales

I am a sales and operations professional with 9+ years of experience across B2B sales, business development, account management, customer relationship management, negotiation and team leadership.

Throughout my career, I have managed complex customer relationships, developed business accounts, led full sales cycles, negotiated commercial opportunities, coordinated multiple stakeholders and operated in fast-paced, customer-facing environments.

My approach to sales is consultative and structured: understand the customer's current situation, uncover meaningful business problems, quantify impact, align the solution to measurable outcomes and create a clear path toward a decision.

This portfolio shows how I translate that commercial background into an Account Executive motion - from research and outbound through discovery, qualification, demonstration, negotiation and close.

CORE COMMERCIAL STRENGTHS

- B2B Sales & Business Development
- Account & Key Account Management
- Full-Cycle Sales
- Consultative Selling & Needs Analysis
- Negotiation & Closing
- Customer Relationship Management
- Cross-Functional Collaboration
- Team Leadership & Operational Discipline

02. MY SALES METHODOLOGY

1	RESEARCH Understand the account, industry, business model, stakeholders and relevant trigger events.
2	PROSPECT Create relevant outreach around a business problem - not a generic product pitch.
3	DISCOVER Understand current process, pain, priorities, impact and desired business outcomes.
4	QUALIFY Confirm business impact, buyer, decision process, timing and a realistic path to purchase.
5	DEMONSTRATE Connect capabilities directly to the problems and outcomes uncovered in discovery.
6	VALIDATE Confirm value, stakeholder alignment, requirements, risks and mutually agreed next steps.
7	NEGOTIATE Protect value while resolving commercial concerns and barriers to purchase.
8	CLOSE & EXPAND Create decision clarity, execute the agreement and continue creating value after the sale.

03. MOCK DEAL: ICP & BUYER PERSONA

Simulated FinTech SaaS opportunity

Product: AI-powered financial operations platform that automates reconciliation, consolidates reporting and supports finance workflows.

ICP	Mid-market e-commerce / digital commerce companies
Company size	150-750 employees
Illustrative revenue	\$50M-\$250M
Primary buyer	CFO / VP Finance
Key stakeholders	Finance Director, Controller, Operations, IT / Security
Trigger events	Rapid growth, finance headcount pressure, ERP changes, slow month-end close, increasing transaction volume
Core problem	Manual reconciliation and fragmented reporting create delays, errors and poor visibility.
Desired outcome	Faster close, fewer manual hours, improved accuracy and better real-time financial visibility.

BUYER PERSONA - CFO

- Priorities: financial control, predictable reporting, cash visibility, scalability and efficient use of finance headcount.
- Likely concerns: implementation risk, integration, security, ROI, adoption and disruption to existing processes.
- Business language: close time, accuracy, cost of manual work, working capital, auditability, visibility and risk.

04. ACCOUNT RESEARCH & PROSPECTING

Before outreach, I would build a concise account hypothesis using public information: business model, growth signals, finance leadership, technology stack where available, hiring patterns and relevant operational changes.

EXAMPLE ACCOUNT HYPOTHESIS

The target is a fast-growing e-commerce company with increasing transaction volume and a lean finance team. My hypothesis is that reconciliation and reporting complexity has grown faster than finance headcount, creating manual work and slowing month-end visibility.

OUTBOUND EMAIL

Subject: Reducing manual finance work as transaction volume grows

Hi Sarah,

I noticed your team has been scaling alongside continued e-commerce growth. Finance teams at this stage often find that reconciliation and reporting become increasingly manual as transaction volume and systems multiply.

I'm curious how your team is handling reconciliation and month-end reporting today, and whether reducing manual work is a priority this year.

If relevant, I'd be happy to share how similar finance teams approach automating these workflows and improving visibility.

Best,
Rami

COLD CALL OPENING

"Hi Sarah, Rami here. I'll be brief. I work with finance teams that are dealing with growing transaction volume and increasingly manual reconciliation. I wanted to understand whether that's something your team is experiencing as well - or if you've already solved it."

05. DISCOVERY & QUALIFICATION

The objective of discovery is not to rush into a demo. It is to understand whether a meaningful problem exists, what it costs the business, who cares about solving it and how a decision would actually happen.

DISCOVERY QUESTIONS

- Walk me through how reconciliation and month-end reporting work today.
- Where does the process become most manual or time-consuming?
- How many people are involved, and roughly how much time does the team spend on it each month?
- What happens when data does not reconcile or reporting is delayed?
- How does that affect leadership visibility or other teams?
- What have you already tried to improve the process?
- Why is this worth addressing now rather than six months from now?
- If you found the right solution, what would a successful outcome look like?
- Who besides you would need to be involved in evaluating a solution?
- How do you typically evaluate and approve a platform like this?

QUALIFICATION SNAPSHOT - MEDDPICC-INSPIRED

Metrics	Illustrative: reduce manual reconciliation hours by 50%; shorten close by 2 days.
Economic Buyer	CFO.
Decision Criteria	Integration, accuracy, security, implementation effort, ROI and usability.
Decision Process	Finance evaluation -> IT/security review -> commercial approval -> signature.
Pain	Manual work, delayed reporting, errors and limited visibility.
Champion	Finance Director who owns the current process and benefits directly from improvement.
Competition	Status quo, spreadsheets, internal workarounds or another automation platform.

06. DEMO STRATEGY

I would not deliver a generic feature tour. The demo would be built around the pains and outcomes confirmed during discovery.

Demo formula: Pain -> Relevant Capability -> Workflow -> Business Value -> Validation Question

Pain	Capability	Demo	Value	Validate
Manual reconciliation	Automated matching & exception handling	Show how transactions are matched and exceptions surfaced	Reduce repetitive work and focus finance time on exceptions	Would this remove the manual step you described?
Fragmented reporting	Unified dashboard	Show consolidated reporting across sources	Improve visibility and shorten reporting cycles	Is this the level of visibility leadership needs?

Pain	Capability	Demo	Value	Validate
Slow close	Automated workflows	Show task ownership, status and alerts	Reduce bottlenecks and create accountability	Where would this have the biggest impact in your close process?

07. OBJECTION HANDLING

“It's too expensive.”

Approach: Clarify what the price is being compared with, return to quantified impact and test whether value or budget is the real concern.

Example response: “When you say expensive, is the concern the absolute budget, or that the expected return isn't clear enough yet?”

“We're happy with our current process.”

Approach: Explore whether 'working' means optimal and identify hidden cost, risk or future scalability issues.

Example response: “That makes sense. What would need to change in the current process for this to become worth revisiting?”

“Send me some information.”

Approach: Avoid a blind send; earn context and a specific next step.

Example response: “Happy to. To make it useful, which area matters most - reconciliation, reporting or close automation? If I send that, can we reconnect for 15 minutes Thursday?”

“Not a priority right now.”

Approach: Understand priority, timing and trigger rather than forcing urgency.

Example response: “Understood. What is taking priority today, and what would need to happen for this to move higher on the list?”

08. PIPELINE & CRM MANAGEMENT

A healthy pipeline requires more than moving deals between stages. Every opportunity should have evidence, a clear next step, stakeholder visibility and a realistic close path.

Prospecting	Target account + relevant hypothesis + outreach sequence
Qualified	Problem and fit confirmed; reason to continue
Discovery	Pain, impact, stakeholders, timing and process understood
Demo / Validation	Solution mapped to confirmed needs; buyer feedback captured
Proposal	Commercial scope and business case aligned
Negotiation	Remaining commercial / legal / security issues identified
Closed Won / Lost	Decision documented; implementation handoff or loss reason captured

CRM DISCIPLINE

- Every active opportunity has a dated next step.
- Decision makers and influencers are mapped.
- Close date is evidence-based, not wishful.
- Risks and blockers are visible early.
- Discovery notes capture customer language and measurable impact.
- Forecast reflects buyer behavior and deal evidence.

09. BUSINESS CASE, NEGOTIATION & CLOSE

Illustrative business case - figures below are intentionally hypothetical and are used only to demonstrate sales reasoning.

Current state	Illustrative impact
3 finance employees spend 35 hrs/month each on manual reconciliation	105 hours/month
Blended finance labor cost	\$60/hour
Estimated manual labor cost	\$6,300/month
Potential 50% reduction in manual effort	~\$3,150/month labor capacity recovered
Additional value	Faster close, fewer errors, improved visibility and scalability

NEGOTIATION PRINCIPLES

- Return to business value before discussing discount.
- Trade rather than give: any concession should be linked to term, scope, timing or commitment.
- Clarify the real blocker: price, budget, risk, procurement, legal, security or priority.
- Maintain a mutual action plan with owners and dates.
- Do not confuse verbal enthusiasm with a committed decision.

CLOSING QUESTION

"Based on what we've validated - the business impact, stakeholder requirements and implementation plan - is there anything preventing us from moving forward on the agreed timeline?"

10. MOCK DEAL - END-TO-END

1. Target

Mid-market e-commerce company experiencing increasing finance complexity.

2. Hypothesis

Growth has increased reconciliation volume and manual reporting burden.

3. Outreach

CFO contacted with a problem-led email and call.

4. Discovery

Manual hours, close delays, error risk and visibility gaps uncovered.

5. Qualification

CFO economic buyer; Finance Director champion; IT/security required.

6. Demo

Focused on automated reconciliation, exception handling and unified reporting.

7. Business Case

Illustrative savings + faster close + reduced operational risk.

8. Objection

Buyer questions implementation effort and price.

9. Validation

Implementation plan and ROI reviewed with Finance + IT.

10. Negotiation

Commercial terms aligned without discounting before value validation.

11. Close

Mutual action plan completed; agreement signed; implementation handoff.

12. Expansion

Post-launch success review and additional workflow opportunities identified.

11. HOW I WOULD SELL YOUR PRODUCT

For a real company, I would replace the simulated opportunity with a company-specific plan. My first objective would be to understand the product, customer, market and sales motion before trying to pitch.

- Define the ICP using current customers, win/loss patterns, firmographics and trigger events.
- Map buyer personas, business problems, desired outcomes and common objections.
- Learn the product through customer use cases rather than features alone.
- Build discovery questions around the customer's workflow and measurable business impact.
- Understand qualification criteria and the company's actual sales process.
- Create messaging by persona and test outbound hypotheses.
- Run demos around confirmed pain and business value.
- Maintain disciplined CRM notes, next steps, stakeholder maps and forecast evidence.
- Review wins and losses to continuously improve messaging, qualification and execution.

12. 30 / 60 / 90 DAY AE PLAN

FIRST 30 DAYS	Learn product, market, ICP, customer stories, competitors, CRM process and sales methodology. Shadow calls and build product fluency.
DAYS 31-60	Run discovery and demos with coaching, build pipeline, improve qualification, develop account plans and establish consistent CRM discipline.
DAYS 61-90	Own opportunities end-to-end, improve conversion quality, forecast with evidence, build repeatable outbound habits and contribute insights to the team.

THANK YOU

This portfolio is designed to demonstrate sales thinking and process. The mock company, metrics, financial assumptions and deal outcome are illustrative and do not represent claimed employment experience or an actual customer transaction.