

THE COMPLETE GUIDE TO
MEDDICC



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A BRIEF HISTORY OF MEDDIC, MEDDICC, AND MEDDPICC

Today, PTC has over 6,000 employees across 80 offices in 30 different nations. It generates over a billion dollars in revenue annually and is publicly traded. However, like most companies, it wasn't always that way.

In the mid 90's Dick Dunkel worked under SVP John McMahon with his teammate, Jack Napoli. Dick undertook an exercise that asked three simple questions about PTC's sales team:

1. Why do they win deals?
2. Why do they lose deals?
3. Why do deals slip?

Dick found six elements that were common across all three questions.

The story goes that as Dick and Jack were preparing to lead a sales education training, Dick wrote the first letter for each element on the board, and Jack witnessed the "birth" of MEDDIC. John signed off on the standardization of the acronym, and soon all of PTC was using the framework.

In the following four years, PTC's sales revenue grew from \$300 million to \$1 billion and not a single sales forecast was missed for 11 years.

As former PTC'ers began to filter to other organizations, the success of the framework spread to today, where it is considered the go-to sales qualification framework for complex deals.

"When you look at the highest growth, best of the best enterprise companies and you look at the DNA, you can usually always find MEDDICC and some link back to PTC."



Andy Whyte
Author, Sales Director
Branch

IS IT MEDDIC, MEDDICC, OR MEDDPICC?

THE ORIGINAL FRAMEWORK

The original framework consisted of six letters, each standing for a component of the framework:

Metrics
Economic Buyer
Decision Criteria
Decision Process
Implicate Pain
Champion

NEW VARIATIONS

However, as the framework has evolved and times have changed, it has been found necessary to call out specific line items within each of the large components. This is because they have become more important to deals, team teams want to ensure that they are addressed.

This has resulted in two different variations of MEDDIC:

MEDDICC

Metrics
 Economic Buyer
 Decision Criteria
 Decision Process
 Implicate Pain
 Champion
 Competition

MEDDPICC

Metrics
 Economic Buyer
 Decision Criteria
 Decision Process
 Paper Process
 Implicate Pain
 Champion
 Competition

So which version is the right one? The seven and eight-letter versions are the most commonly used, but it comes down to each organization's individual needs. If you feel your team needs to call out or focus on a particular component, it should be included in the overall acronym but more importantly implemented as a standard in your sales process.

WHY MEDDICC WORKS

IT'S EVIDENCE-BASED

MEDDICC is unlike any other framework in that it is entirely evidence-based. It leaves no room for interpretation or gut feeling. Rather, it focuses purely on hard evidence and actions. This means that MEDDICC results in more accurate forecasts and better strategies because it leaves nothing up for interpretation.

ELIMINATES RISK

MEDDICC works to eliminate risk by putting the spotlight on the specific points at which deals are lost. For example: misaligned metrics, a focus on the wrong purchaser, a lack of understanding around decision criteria, unclear decision process, an insufficient champion, or better-positioned competition. This systematic approach checks all the boxes to help close your most important deals.

THE OPERATING SYSTEM

MEDDICC is so powerful because of the manner in which it is applied to a business. It does not replace any existing sales methodology, strategy, or process, but rather enhances it. Andy Whyte likens MEDDICC to an operating system. It acts as the foundation, or the base layer that other sales methodologies, processes, and strategies operate on top of. Furthermore, it actually enables these other methods to be more effective.

INCREASED ACCOUNTABILITY

MEDDICC works best when shared with others. Whether it is within a CRM, on a whiteboard, in team meetings, or one-on-one's, the step-by-step visibility from MEDDICC provides excellent visibility into deals, making it useful for reps, managers, and leaders.

MEDDICC IN THE MODERN AGE OF REVENUE OPERATIONS

So why does a framework created in the 90's work so well today, when revenue operations is quickly reshaping the landscape of the sales world?

It just so happens that many of the benefits of MEDDICC directly align with the goals of RevOps.

RevOps seeks to unify sales, marketing, and customer success through the integration of data, metrics, platforms, strategies and goals. Rather than each team functioning in a vacuum, the departments work collaboratively (and co-dependently) toward common goals.

This approach results in massive improvements in both effectiveness and efficiency for each individual team, as they benefit from the data gleaned from others. It also leads to a massive improvement in customer experience, as the discovery, buying, and ownership process is seamless and completely focused on client needs.

COMMON LANGUAGE

For revenue operations and sales to work effectively together, they must speak a common language, and MEDDICC provides that. MEDDICC is a communication method through which sales and RevOps can examine pipeline, deal progression, goal attainment, and so on. They can also judge the likeliness a deal will be closed based on the strength of the MEDDICC workup.

DATA-BACKED

Rather than relying on feelings and assumptions, MEDDICC works in the realm of hard data, which is perfect for RevOps. Sales reps can provide information on each specific component, that RevOps can then analyze to determine pipeline fulfillment, forecast accuracy, and progress towards goals.

Platforms like BoostUp actually contain in-line MEDDICC functionality within a reps' typical workflow. Building any sales process into CRM's like Salesforce can be difficult. Therefore, the ability to quickly edit, add, or update MEDDICC information in BoostUp means that sales reps actually use it. This creates more complete, accurate data for RevOps to use.

PERFECT FOR CUSTOMER SUCCESS

Another driving force behind RevOps is the realization that customers need just as much (if not more) attention than prospects. Customer retainment is essential to the bottom line, and the lessons learned from sales and marketing improve that.



Caroline Woussen-Francia

Author, Founder
Uppercut-First

“It helps businesses better understand where the churn comes from. Is it a lack of KPI’s, not enough stakeholders, a poor champion? It’s not just for sales.”

Therefore, organizations have shifted to more integrated strategies that unite sales, marketing, and customer success all as revenue-generating forces. MEDDICC is especially powerful when a sales prospect transitions to a customer, and they are passed from sales to success. The MEDDICC framework provides the metrics, contacts, decision process, and key contacts that all determine the success of a purchase agreement, and whether or not the customer will renew or upgrade.



Andy Whyte

Author, Sales Director
Branch

“You hand success a gift, wrapped with a bow on top. It’s the MEDDICC from a deal. Here’s the KPIs that they are going to measure success by, the economic buyer that will sign off on the renewal, here’s how and why they made the decision. Here’s the pain we’re going to solve for them, and here’s the champion that you need to keep in touch with.”

THE BENEFITS OF MEDDICC

ACCELERATES OPPORTUNITY REVIEW

Since it standardizes language and process, MEDDICC accelerates the opportunity review process. Regardless of the level or position within the organization, everyone will instantly understand where a deal stands when looking at the framework.

DRIVES CONSISTENCY AND TRANSPARENCY

MEDDICC provides a standard cross section of every deal, that is publicly recorded and viewable. It shows exactly what is happening inside a deal, who is involved, the progress being made, and what needs to be done.

SHORTENS THE SALES CYCLE

MEDDICC specifically focuses on the factors that make deals close. Therefore, every action a rep takes against the MEDDICC framework directly impacts the deal.

FACILITATES SALES EXECUTION

One of the most common struggles of sales today is how to determine the next best action to take against an account. The MEDDICC framework intrinsically provides insight into the next steps that must be taken in the sale.

"Many people think MEDDICC is its own sales methodology, which it can be, but it can also serve as the foundational checklist that you can build your sales methodology on top of, like Sandler or Challenger Selling. MEDDICC makes these methodologies better."



Caroline Woussen-Francia

Author, Founder
UpperCut-First

THE MEDDICC FRAMEWORK

At its core, the MEDDICC framework is a series of components that when combined, lead to a winning deal. Each piece of the entire MEDDICC process is laid out below, as well as what should be done with them.

METRICS

The metric component of MEDDICC focuses on the quantitative value that your solution delivers. These are demonstrated through the existing results you have already delivered for clients, and the numbers that you can provide to your potential buyer.

When selling with MEDDICC, it is imperative that both the buyers and sellers align on which metrics are intended to be driven. Many salespeople make the mistake of solely selling on values that have been delivered before, or a set of pre-determined that they have been proven to be successful at. In reality, every business is different, and therefore to be most effective, sellers should align on their buyer's metrics in order to properly meet their needs.

ECONOMIC BUYER

Commonly mistaken for the Champion, the Economic Buyer is the individual who has the authority to make the final purchase decision, including the ability to actually spend the money.

This individual has the power to sign the contract or end the deal. They are typically high level and have profit or loss responsibility. The Economic Buyer also has access to discretionary funds to make purchases outside of the budget and will most definitely be a part of the approval process.

As stated before, this individual does not have to be your Champion, but they must be engaged. Sellers should consult with them to help meet their goals and align their objections with the solutions.

DECISION CRITERIA

This is the set of criteria by which your product or solution will be evaluated. It is imperative that these are discovered and laid out. Sellers should match their value propositions and benefits with the needs that are specifically defined in the decision criteria.

Andy Whyte states that there are three main types of criteria:

1. Technical - Technical requirements such as integrations
2. Economic - Viability from the perspectives of finance, risk, and efficiency
3. Relationship - How aligned the two organizations are

Decision criteria is the first component of MEDDIC that can be influenced. Sellers can use a consultative approach to provide their input on the decision criteria based on their expertise. If they feel that a certain decision point is more beneficial than others, they can adjust it to increase their chances of a successful sale.

DECISION PROCESS

This is the process through which a final purchase decision will be made. It includes the steps through which the buyer will evaluate solutions, determine their fit against the decision criteria, and initiate a purchase.

Again, this process can be influenced by a salesperson, who can steer the process in a consultative manner.

It's important to disassociate effort and progression. Many make the mistake of believing that a flurry of activity or communications means that a deal is strong. In an evidence-based methodology like MEDDIC, we must measure the advancement of the deal against the established decision process. If it is not moving forward, there is a problem.

PAPER PROCESS

The paper process is the first optional component within the MEDDICC framework. Some organizations choose to tie it in with the decision process, while others feel the need to specifically call it out.

The paper process examines the documentation that is necessary for a closed-won deal. This includes technical documentation, security certifications, and other required validations. It is crucial to get this information as soon as possible so that the right internal and external stakeholders can be notified. A sales rep can get this information from either their Champion or the Economic Buyer.

IMPLICATE THE PAIN

The pain point is one of the most common sales strategies, and it is no less important in MEDDICC. The sales rep must find the problems that are faced within the business and position their product as the best solution.

So how do you find the pain? Andy Whyte states, "Discovery is an imperative part of any pain discovery. While you can find some pain from the outside in by reading public documentation and even from being able to try some of the organization's services if you have access to do so, the main source of the most valuable pain is going to come directly from your customer."

Although pain is near the end of the MEDDICC acronym, it is by no means something that should be neglected. Implicating pain should be done at the very beginning of the sales process.

CHAMPION

The champion is another common sales method, but what is it exactly? A Champion is an internal seller who works at the prospect company. They are in meetings when salespeople can't be, they can speak up for you when you're not there, and they honestly share what others may not be saying.

Unfortunately, the Champion is often mis-identified as the person who speaks the most in meetings, who shares the most information, or is the most engaged. This leads to lost deals.

Rather, a Champion is a person who is within a position of power who has a vested interest in your success. They have a "they win, I win" mentality, and they depend on you as much as you depend on them.

Use [this method](#) to validate your sales champion.



Caroline Woussen-Francia

Author, Founder
Uppercut-First

"A champion is not the person who does the most talking. It is the person who, when they speak, everyone else goes silent"

COMPETITION

Competition is sometimes left out of the general framework as it can be considered every step of the way, but it also can be very important to call out and document.

In MEDDICC, your actual competitors are not the only thing considered to be competition. Anything competing for the same resources, such as internal projects, other ideas, and even the option to do nothing.

Competition should be identified as early as possible so that it can be addressed throughout the sales process.

MEDDICC IMPLEMENTATION

START FROM THE TOP-DOWN

MEDDICC requires a top-down approach for proper implementation and adoption on a larger scale. When it comes to creating buy-in, it's essential to showcase the value and power of using the framework. Fortunately, with MEDDICC, that's easy.

Caroline suggests creating dashboards for leadership and managers based on the MEDDICC framework. This way, they can know at a glance where certain deals stand and use that information to make predictions of how they will perform against their forecasts.

ALIGN WITH DRIVING FACTORS

For reps, show them how it gets what they want most. That is, big commissions and recognition. To get those things, a deal needs stakeholders, pain with a business impact, a known decision process, and a timeline. MEDDICC is the framework that can track and manage all of those factors.

When starting to use MEDDICC, Caroline adds that it's important to not focus on its components. Rather, form discussions around what's missing and ensure that everyone can have an open and honest conversation about finding solutions.

The screenshot displays the BoostUp CRM interface. At the top, there's a search bar and various filters. Below that, a summary dashboard shows key metrics: Booked (60 deals, \$5.2M), Commit (28 deals, \$2.3M), Best Case (78 deals, \$6.28M), Pipeline (146 deals, \$9.9M), and a total of 1,006 deals worth \$15.7M. A table lists deals with columns for Deal Name, User, Account Name, Engagement Risk, and MEDDIC score. A detailed view of the 'Acme Sales' deal is shown on the right, including metrics like 'Looking to decrease lead response time', 'Economic Buyer' (Clarence Flowers (CRO)), 'Decision Maker' (Select), 'Decision Criteria' (Forecast accuracy should be close to 85%), and 'Identify Pain' (Type). The MEDDIC score for 'Acme Sales' is 3/6, with a note '10 day ago'.

DEAL NAME	USER	ACCOUNT NAME	ENGAGEMENT RISK	MEDDIC	CATEGORY
Acme Sales	Janice Caston	Acme Inc.	84 High	3/6	Commit
Sterling Cooper	Gonzalo Garcia	Sterling Cooper	80 High	3/6	Best Case
Gekko & Co	Janice Caston	Gekko & Co	75 High	2/6	Commit
Hooli	Gonzalo Garcia	Hooli Inc.	29 Low	5/6	Best Case
Wonka Industries Requireme...	Janice Caston	Wonka Industries	55 Medium	3/6	Best Case
Wayne Enterprises	Gonzalo Garcia	Wayne Enterprises	50 Medium	3/6	Best Case
Duff Corp Sales Team	Gonzalo Garcia	Duff Corp	45 Medium	3/6	Best Case
Bubba Gump	Janice Caston	Bubba Gump	30 Low	5/6	Best Case
Oscorp	Janice Caston	Oscorp	22 Low	2/6	Commit

USE A REVOPS PLATFORM

Unfortunately, CRM's just are not made for qualification frameworks, and many teams have experienced the pain of attempting to implement MEDDIC within one. Implementing MEDDIC in a CRM is time-consuming, takes valuable resources, is harder to enforce the usage of, and does not properly track against goals.

Instead, teams who are serious about gaining the benefits provided by MEDDIC should choose a revenue intelligence platform that is ready-made for sales qualification frameworks like MEDDIC.

This will allow teams to analyze deals, pipeline, and forecasts with the MEDDIC framework, and ensures higher adoption rates, as they are easier to use for reps.

OPTIMIZE YOUR MEDDIC STRATEGY

So, with a MEDDIC strategy in place and your team steadily checking each component off the list as they move through deals, how do you make a MEDDIC implementation even better?

MEDDIC INTELLIGENCE

To improve anything, you must first measure it. Revenue Intelligence platforms that support sales qualification frameworks like MEDDIC can collect and examine data surrounding it.

For example, in BoostUp, teams can perform an analysis of what components of MEDDIC have been completed for what deals, and identify deals that are not fully MEDDIC compliant, therefore spotting risk.

The screenshot displays the BoostUp MEDDIC Intelligence interface. A search bar at the top allows for finding deals, meetings, and calls. Below it, various filters are available, including 'Closing In: Current Quarter', 'Changes Since: Last 7 days', 'User: All', 'Forecast Category: All', 'Stages: All Active', 'Amount: \$25K - \$210K', and 'Opportunity Type: All'. A 'Meddic: Updated Anytime' filter modal is open, showing options for 'Updated Anytime', 'Not Entered Anytime', 'Decision Maker' (set to 'Not entered'), and 'Not updated since last 7 days' (selected). The modal also includes a 'Metric' dropdown and 'Apply' and 'Cancel' buttons.

The main table displays deal data with columns for 'COUNT', 'ENGAGEMENT RISK', 'MEDDIC', 'CATEGORY', 'STAGE', 'DEAL AMOUNT', and 'CLOSE DATE'. Summary statistics at the top right show: Best Case (78 deals) at \$6.28M, Pipeline (146 deal) at \$9.9M, and Total (206 deals) at \$15.7M. The table lists several deals, including those from Gekko & Co, Wonka Industries, Wayne Enterprises, Duff Corp Sales Team, Bubba Gump, Oscorp, Polycon, and Avocaipital.

COUNT	ENGAGEMENT RISK	MEDDIC	CATEGORY	STAGE	DEAL AMOUNT	CLOSE DATE
	84 High	3/6 7 days ago	Commit	Decision	\$175,000	20 Aug '20
	80 High	3/6 10 days ago	Best Case	Decision	\$140,000	20 Aug '20
	75 High	2/6 30 days ago	Commit	Negotiation	\$135,000	20 Aug '20
	29 Low	5/6 2 days ago	Best Case	Contract	\$120,000	20 Aug '20
	55 Medium	3/6 1 day ago	Best Case	Contract	\$115,000	20 Aug '20
	50 Medium	5/6 17 days ago	Commit	Decision	\$110,000	20 Aug '20
	45 Medium	0/6	Commit	Decision	\$110,000	20 Aug '20
	30 Low	3/6 15 days ago	Best Case	Negotiation	\$100,000	20 Aug '20
	22 Low	2/6 8 days ago	Commit	Negotiation	\$95,000	20 Aug '20
	20 Low	5/6 4 days ago	Commit	Decision	\$80,000	20 Aug '20
	28 Low	5/6 6 days ago	Commit	Decision	\$80,000	20 Aug '20

When it comes to adoption, managers can also see which reps are utilizing MEDDIC. One of the unique advantages of BoostUp is that it analyzes not just the data that is present, but a lack of data and therefore can determine inconsistencies in data that lead to decreases in revenue.

For example, if a deal has progressed within the MEDDIC framework, but there was a lack of engagement on the deal, BoostUp can flag the account as a potential risk. Inversely, if the deal saw a high amount of engagement and activity, but no MEDDIC progression, it's also of concern.

OUR PERSPECTIVE

Today, every B2B sales organization needs a sales qualification methodology. Regardless of industry, size, or sales structure, the benefits are boundless.

Teams with qualification processes enjoy higher close rates, more accurate forecasts, better resource allocation, and ultimately more revenue.

However, organizations face many hurdles when implementing a qualification framework. Sales teams are under constant pressure to close deals, and typically want to stick with what they know. It's also extremely challenging and time consuming to build the process into a CRM, train and enable teams, and create accountability throughout the organization.

The screenshot displays the BoostUp CRM dashboard. At the top, there are filters for 'Closing in: Current Quarter', 'Changes Since: Last 7 days', 'Territory: All', 'User: All', 'Forecast Category: All', 'Stages: All Active', 'Amount: \$25K - \$210K', and 'Opportunity Type: All'. Below these are more specific filters: 'Meddic: Not updated since last 7 days', 'Forecast Risk: All', 'Risk Score Category: All', and 'Competitors: All'. A summary bar shows: 'Booked (60 deals) \$5.2M', 'Commit (28 deals) \$9.9M', 'Best Case (78 deals) \$9.9M', 'Pipeline (146 deal) \$9.9M', and 'Total (206 deals) \$15.7M'. A 'Save view as' dialog box is centered on the screen, with the following details:

- Name:** Meddic not updated
- Send me email Weekly on Monday
- Pin to make this your default view
- Buttons: Save, Cancel

The background table lists various deals with columns for DEAL NAME, USER, COMPANY, RISK SCORE, STAGE, DEAL AMOUNT, and CLOSE DATE. Visible rows include Acme Sales, Sterling Cooper, Gekko & Co, Hoell, Wonka Industries, Wayne Enterprises, Duff Corp Sales Team, Bubba Gump, Oscorp, Polycon, and Asecapital.

All of these issues are solved with a revenue intelligence platform that supports qualification methods like MEDDIC.

Within BoostUp, you can name and map out your sales process in a few clicks. Sales reps can easily update each required step directly inline. Your managers now get real-time visibility into deal progression and sales process compliance.

The inline sales process side panel accelerates your sales process reviews, improves compliance, and drives consistency across the entire sales organization.

This natively built process encourages a more rapid and complete adoption of your new sales process. Rather than requiring extraneous work, the BoostUp platform streamlines the use of the MEDDIC or any custom sales process by providing a simple, easily understood, and easy to use method of utilizing it directly within the same space where a salesperson typically works.

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