

CASHWEADS ENTERPRISE PLAYBOOK · SAMPLE EDITION

Garallen Company

Enterprise Sales Playbook

How to find, win and grow EV-charging and fleet-energy accounts. Built around one live Tier 1 target: **Dennergo**.

8-stage process

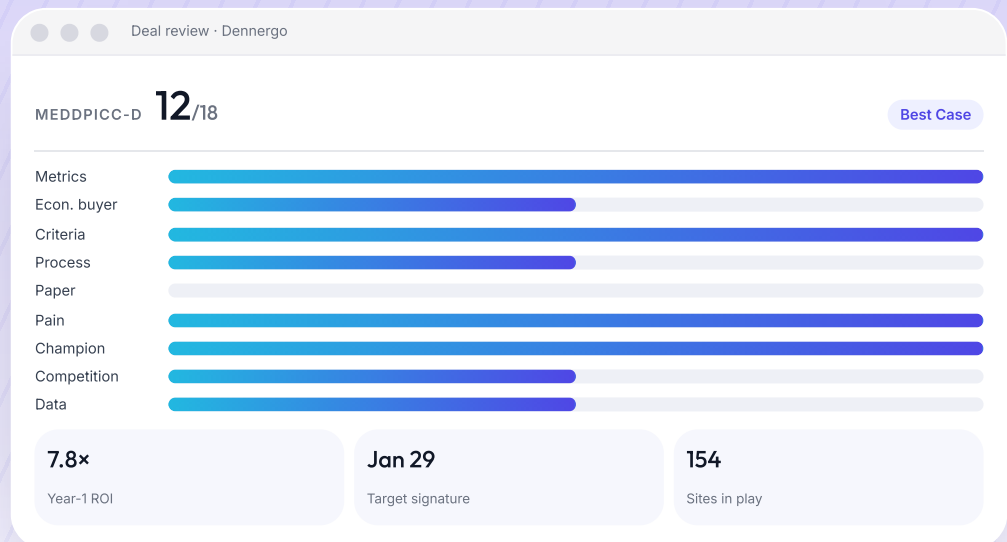
MEDDPICC-D

Account plan

Business case

Mutual action plan

Sequences & talk tracks



PREPARED FOR

Garallen Company revenue team (CRO, Account Executives, Solutions & Analyst leads)

PREPARED BY

Cashewleads · October 2026

EDITION

v1.0 · Sample edition

BEFORE YOU BEGIN

About this playbook

This is a sample Cashewleads Enterprise Playbook. Garallen Company, Dennergo, every other company, every person and every figure in it are fictional and illustrative. They are modelled on a real engagement to show the depth and format of the deliverable, not to describe any real business.

Three problems it solves

01

Ramp new sellers fast

One shared definition of each stage, each exit criterion and each artifact, so a new AE can run a full cycle in their first quarter.

02

Forecast with evidence

MEDDPICCC-D scoring and stage gates turn opinions into proof, so Commit means committed.

03

Land and expand on purpose

Six land-and-expand motions, a tiering model and a trigger library point effort at the accounts most likely to buy now and grow later.

What it is

- A field guide to Garallen Company's end-to-end enterprise motion, from first signal to expansion
- Grounded in what Garallen Company actually sells, to whom and how, with every claim tagged by confidence
- Worked through one live Tier 1 target, Dennergo, so every template has a real example
- A gut check for deal milestones, deal reviews and forecast calls

What it is not

- A product manual or a script to read word for word
- A price book: commercial figures are placeholders until RevOps confirms them
- Approved marketing copy: proof points need reference permission before external use
- Final: items marked Assumption or Inferred need an owner to validate them

How to read the tags

Sourced

Stated in a cited source (see the Evidence Register, Appendix B).

Inferred

Reasoned from sources; directionally right, wording may change.

Assumption

Enablement placeholder (targets, thresholds, tools). Validate before use.

[S#] refers to the Evidence Register (Appendix B). GK = general knowledge to verify. Urgency: **H** act within 1 week · **M** within 30 days · **L** nurture.

Who this is for

Garallen Company revenue team (CRO, Account Executives, Solutions & Analyst leads). Prepared Oct 16, 2026 from public sources; pending leadership review.

CONTENTS

What's inside

•	About this playbook	2	07	Business Case, ROI & TCO Two business cases, one story	28
•	Executive summary & key findings	4	08	Pilot Setup & Checklists Prove value fast, cheaply and toward a decision	30
PART I Foundations					
01	Research Summary What Garallen Company sells, to whom, and how	6	09	Mutual Action Plan One shared plan from kickoff to the 90-day value review	32
PART II The Sales Process					
02	The Sales Process: Stage Overview Eight stages, one definition of done	10			
03	The End-to-End Sales Motion Pipeline → qualification → discovery → demo → pilot → partners → executives	14	PART V Focus & Grow		
PART III Plan & Prioritize					
04	Territory Planning Where to hunt, in what order, with what capacity	20	10	Account Tiering Spend time where the score says, not where the logo says	35
05	Account Plan: Dennergo The template, filled in for a live Tier 1 account	22	11	Buying Triggers & Events Twenty signals that make an account worth a call this week	36
PART IV Win the Deal					
06	Opportunity & Deal Review Twenty minutes that decide the forecast	26	12	Land & Expand Motions Six motions, each with a land offer and three expand steps	38
PART VI Field Kit					
APPENDIX Appendix					
A	Accuracy & Adaptation Notes What was adapted, what was assumed, who validates	44	13	Field Kit: Sequences & Talk Tracks What to say, in what order, to whom	40
B	Evidence Register Every [S#] tag, in one place	46			

EXECUTIVE SUMMARY

Selling decisions, not software

Garallen Company sells decisions, not software. Every Garallen Company deal starts with a question a buyer must answer with money on the line: which sites to build, which to upgrade, how big the battery should be, whether to wait for a grid upgrade, which depot to electrify first. Plan answers that question in minutes, a Garallen Company analyst checks the answer within a business day, and the buyer leaves with a report that a CFO or a lender will accept.

The market has turned in Garallen Company's favour. With federal credits for new charging property and commercial EVs gone, and many first-generation networks now aging, operators can no longer build on optimism and a spreadsheet. Every project in flight needs to be re-modelled, and every underperforming site needs a plan. That makes rigorous modelling, and brownfield optimization in particular, a timely wedge.

The team is small, so the motion has to be lean: one AE can run a full cycle, the CEO and three industry advisors open executive doors, and partners (EPCs, consultancies, conversion specialists) extend reach. This playbook gives that team one shared process: eight stages with exit criteria, MEDDPICC-D qualification (MEDDPICC plus Data readiness), a deal review that produces a forecast category, pilot and mutual-action-plan templates, a tiering model, a library of buying triggers and six land-and-expand motions.

To keep it practical, every template is filled in for one live Tier 1 account: **Dennergo**, a 132-site Mountain West fast-charging operator that just acquired a 22-site network and lost federal credit eligibility on 14 planned builds. Use Dennergo as the model for how good looks; replace its details with your own account's.

Key findings

- 1 **What Garallen Company sells**
A modular SaaS platform that designs, finances and operates EV-integrated charging sites: **Garallen Plan** (site and fleet techno-economic design with an analyst-reviewed, investor-grade report, usually within one business day), **Garallen Operate** (hub energy orchestration and cost minimization) and **Garallen Flex** (flexibility and demand-response revenue). [S1, S3]
- 2 **Who buys**
Six segments: EPCs and engineering firms, charge point operators (CPOs), fleets and logistics, real estate owners, cities and transit agencies, and energy developers and financiers. Buyers span finance, fleet, network operations, asset management and sustainability. [S1, S4, S5, S6]
- 3 **Proof we can point to**
An EPC partner engaged Garallen Company to re-evaluate 31 operating sites across CO, UT and AZ (Apr 2026); the company claims 18–24% upside on sites never systematically re-evaluated. Garallen Company also designed a 24-store convenience-retail rollout (2025). [S11, S12, S15]
- 4 **How it goes to market**
Small and founder/CRO-led: a product-led entry (free Portfolio Screen for up to 15 sites, then \$45 per site), partner-led deals with EPCs and consultancies, and event-sourced pipeline. [S2, S4, S13, S17]
- 5 **Why now**
Federal credits for charging property (30C) and commercial EVs (45W) have ended for new projects, part of the federal charging program's unobligated funds has been redirected, and aging networks are shifting operators from expansion to optimization. The real competitor is the status quo: spreadsheets, consultants and charger-vendor designs. [S11, S19, S20]

PART I

Foundations

What Garallen Company sells, to whom, and why now.

01 Research Summary

SECTION 01 · WHAT GARALLEN COMPANY SELLS, TO WHOM, AND HOW

01 Research Summary

Ground every conversation in facts. This section captures what Garallen Company actually sells, to whom and how, as of Oct 16, 2026, and tags each finding with its source and confidence. Sellers use the right-hand column; leadership validates anything not marked Sourced.

Identity check

Garallen Company (garallen.example; offices in Denver, CO and Raleigh, NC) is an EV-charging and fleet-energy design, finance and operations SaaS company. Similar-sounding names exist in other industries, so check the domain before trusting any third-party record.

2019

Founded, Denver, CO

~22

Employees (low confidence)

3

Platform modules

6

Buyer segments

1 day

Analyst QA on standard reports

LAND

Analyst QA in ~1 business day

Garallen Plan

Site and fleet investment design

INPUTS

Tariffs, interval data, grid capacity, site layout, fleet telematics

OUTPUT

Investor-grade report: IRR/NPV, sizing, sensitivities, go/no-go


EXPAND

GA status: validate

Garallen Operate

Hub energy orchestration

INPUTS

Live charger, storage, solar and meter data (OCPP / SCADA)

OUTPUT

Continuous electricity-cost minimization with financial tracking


EXPAND

Availability: validate

Garallen Flex

Flexibility revenue

INPUTS

Aggregated storage, on-site generation and flexible charging load

OUTPUT

Demand-response, frequency and wholesale revenue

Figure 1.1 · The Garallen Company platform: every deal lands on a design decision and expands into operations and flexibility revenue.

Findings and what they mean for sellers

#	Topic	Finding	Sales implication	Source	Confidence
1.1	What Garallen Company sells	"The decision platform for EV-integrated charging design, finance and operations": software to plan and run charging sites and depots, greenfield and brownfield.	Sell decisions and outcomes (bankable investment cases, lower capex and energy cost, higher site returns), not "a modelling tool".	S1	Sourced
1.2	Module 1 · Garallen Plan	Site and fleet investment design: interconnection feasibility, storage sizing, EV-load modelling, capex/opex, IRR/NPV sensitivities, vehicle TCO, go/no-go. Inputs via Project, Fleet, Hub and Microgrid workspaces; output is an investor-grade report.	The primary land product: every deal starts with a site, fleet or portfolio decision.	S1, S3, S6	Sourced
1.3	Module 2 · Garallen Operate	Energy orchestration for charging hubs: real-time monitoring and control balancing EV load, storage, solar and feeder limits; continuous electricity-cost minimization with financial tracking.	Recurring "operate" revenue on built sites; the expand motion after design.	S1	Sourced GA status: validate
1.4	Module 3 · Garallen Flex	Aggregates batteries, on-site generation and flexible charging load for demand response, frequency services and wholesale or ancillary revenue.	Late-stage expand; requires market and regulatory qualification per grid operator or utility.	S1	Sourced No launch found: validate

#	Topic	Finding	Sales implication	Source	Confidence
1.5	Product naming	The Apr 2026 press release calls the core product "SiteLens"; the website says "Garallen Plan"; 2023–24 materials describe a "charging performance platform" with Design, Build and Run suites.	Standardize naming in decks and CRM. Recommended: Garallen Company Platform → Plan / Operate / Flex; SiteLens = the Plan site workflow.	S1, S11, S14	Sourced Inconsistent
1.6	Delivery model	Optimization runs in minutes; a Garallen Company analyst QA-reviews results, usually within one business day, before the report is published. Positions itself as an "embedded project partner, beyond traditional consultancy".	A tech-enabled service: sell speed plus expert QA, and scope analyst capacity in every proposal.	S3, S2	Sourced
1.7	Technical credentials	Containerized multi-cloud stack; BI-tool integration; multi-user with admin permissions; APIs for weather, telemetry, tariffs and regulation; deterministic optimization engine for reproducible, auditable results. Standards on request: GDPR, OCPP, OpenADR, lender bankability formats.	Use for IT/security and lender due diligence; respect the "on customer request" qualifiers.	S3, S6	Sourced
1.8	Security posture	Multi-tenant with logical access controls; onboarding data anonymized; hosted on two major public clouds; OWASP Top Ten practices; references ISO privacy and IoT guidelines.	Prepare a security questionnaire pack; claim no certification Security has not confirmed.	S8	Sourced Certifications: validate
1.9	Value claims (company)	Feasibility scenarios "6–8× faster and at lower cost"; "double-digit improvement in project returns"; on existing sites, "18–24% performance improvement" where sites were never systematically re-evaluated (CEO, Apr 2026).	Approved proof points, but always pair them with a customer-specific model.	S1, S11	Sourced Vendor claim
1.10	Segments / ICP	EPCs and engineering firms; fleet owners (logistics, buses, rental and leasing, last-mile); CPOs; real estate owners and managers (REITs, C&I, mixed-use, multifamily, hospitality, self-storage); cities and municipalities; energy developers and financiers.	Six segment plays (Sections 03, 10 and 12).	S1, S4, S5, S6, S13	Sourced
1.11	Buyer personas	CFOs and finance leads, fleet managers, charging-hub owners and managers, asset and portfolio managers, capital planning, operations, sustainability and compliance, municipal environmental analysts, EPC proposal teams.	Persona discovery guides in Section 03.	S4, S5, S6	Sourced
1.12	Reference customers	An EPC partner engaged Garallen Company for 31 operating sites in CO/UT/AZ (Apr 2026, on behalf of a CPO client); a 24-store convenience-retail EV program with a CPO and the same EPC (2025); earlier pilots with a transit agency, a rental-car franchisee, a retail REIT and a solar developer.	Lead references: EPC/CPO brownfield and retail greenfield. Confirm reference permissions first.	S11, S12, S15	Sourced
1.13	Partners	Keystone Ridge Electric (EPC and O&M, "ongoing partnership"); Tidewell Mobility Advisors (consultancy, Jun 2024); Brakeline Fleet Conversions (EV conversion, 2025); a state clean-energy accelerator and a cloud-provider startup program.	The partner-led motion is real and proven: EPCs and consultancies buy or resell analysis for their end clients.	S11, S12, S13, S17	Sourced
1.14	Public pricing	Portfolio Screen for real estate: upload up to 15 addresses free (one account per company), no credit card; \$45 per additional site; a top-level latent-value estimate per site. No other public pricing.	A product-led entry for property owners; sellers convert ranked portfolios into paid designs.	S4	Sourced Other pricing: Assumption

#	Topic	Finding	Sales implication	Source	Confidence
1.15	Sales org signals	CRO Owen Becker; Sales Manager Priya Raman (scheduling link on site); CEO Lena Marchetti active in deals and PR; three industry advisors (Marcus Hale, utilities; Doug Arnett, parcel and logistics fleets; Sana Qureshi, fleet telematics) staff events. About 20–25 employees and two sales staff; the careers page lists only engineering roles.	A small founder-and-CRO team: the playbook must be lean. One AE runs the full cycle; advisors add executive and vertical credibility.	S2, S1, S17, S18, S9	Sourced Headcount: low
1.16	Field marketing	GA launch Mar 2024; trade-media webinar Oct 2024; 2025 US roadshow (10 cities); Charge Infrastructure Forum (Phoenix, 2025); PropTech Buildings Expo 2026 (Austin) targeting CPOs, EPCs, REITs and building managers.	An event-driven pipeline cadence; the real estate expo signals a REIT/CRE motion.	S10, S17	Sourced
1.17	Thought-leadership framework	"Five disciplines" of charging economics: (1) rigorous upfront financial modelling, (2) data-driven utilization forecasting, (3) grid-aware smart charging, (4) living-plan re-optimization, (5) monetized sustainability (credits, RECs).	Use as the discovery spine and the content for the Value Validation stage.	S7	Sourced
1.18	Funding / stage	Founded 2019 by Lena Marchetti and Tomas Reyes. Reported funding varies by source (about \$3M to \$6M), including state clean-energy grants and a climate-fund seed round.	Position as a specialist, agile partner; expect vendor-viability diligence from enterprise buyers.	S16, S13, S15	Sourced Figures conflict
1.19	US policy context	The 30C refueling-property credit is unavailable for property placed in service after Jun 30, 2026; the 45W commercial clean-vehicle credit ended for vehicles acquired after Sep 30, 2025; federal charging-program funds continue through approved state plans, but part of the unobligated balance was transferred to other highway programs.	Thinner subsidies make project economics tighter, so rigorous modelling and brownfield optimization are worth more. Re-model in-flight projects.	S20	Sourced Confirm with tax advisors
1.20	Market context	Roughly 80,000 US public charging locations (federal station data, doubled since 2020); an aging installed base with rising failure rates; a site at 15% utilization can reach profitability with a 5-point utilization gain (industry analysis, as cited); markets maturing from expansion to optimization.	Brownfield CPO optimization is a timely wedge.	S11	Sourced Secondary citations
1.21	Competitors · fleet planning	Telematics-led EV suitability tools; fleet-electrification planning startups; charging-management platforms with an assessment add-on.	Differentiate on grid and energy co-optimization (storage, solar, microgrid), finance-grade outputs and the design-to-operate lifecycle.	S19	Sourced
1.22	Competitors · energy design & ops	Microgrid and DER design software; charging- and energy-management platforms; DERMS and VPP platforms. Incumbents: spreadsheets, engineering consultants and charger vendors' "free" designs.	The biggest competitor is the status quo. As Garallen Company's site puts it, decisions get "delegated to vendors".	S1, S4, GK	Inferred
1.23	Review sites	No listing or reviews on the major software-review marketplaces.	Build proof through case studies and references; consider a review program.	S18	Sourced Absence
1.24	Likely revenue model	Per-site and per-project analysis fees (public \$45/site at the screening tier), multi-user platform subscriptions, recurring Operate fees per hub, possible revenue share on Flex.	Price-book placeholders in Sections 07 and 08; validate with RevOps.	S4, S1	Inferred

How to use this section

Before any first meeting, re-read rows 1.9, 1.12 and 1.19. They are the three facts buyers most often test: what results Garallen Company claims, who has used it, and why the economics changed this year.

PART II

The Sales Process

Eight stages, MEDDPICC-D and the end-to-end motion.

02 The Sales Process: Stage Overview

03 The End-to-End Sales Motion

SECTION 02 · EIGHT STAGES, ONE DEFINITION OF DONE

02 The Sales Process: Stage Overview

Eight stages adapted to a SaaS-plus-expert-QA motion. The classic enterprise "site walk" becomes Site Data Intake & Assessment: a virtual data-room review of tariffs, interval data, grid capacity, telematics and site layout, with a physical visit only when it is warranted.

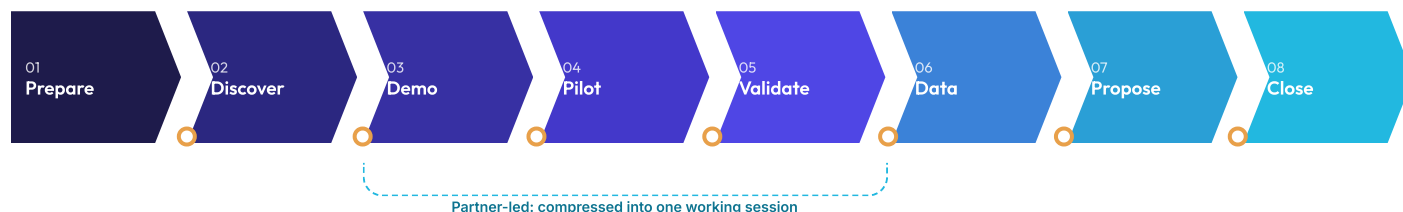


Figure 2.1 · The eight-stage Garallen Company sales process with stage gates. Partner-led deals compress Stages 3–5.

Direct path

CPOs, REITs, fleets and cities run every stage with the end customer. Expect 1–4 months for CPO and REIT portfolios and 3–9 months for fleets and cities (Assumption).

Partner-led path

When an EPC or consultancy buys for its client, Stages 3–5 compress into a single working session and the end client joins as a stakeholder at Stage 7. Typical cycle: 2–6 weeks per project (Assumption).

01

STAGE 1 OF 8

Strategic Preparation

Understand the account's sites, fleet or portfolio; EV program status; grid and tariff context; exposure to lost federal credits; and stakeholders. Form a point of view (POV) on where the value is.

WORK PRODUCTS

Account brief; site/fleet snapshot (public charger locations, depots, properties); a three-hypothesis POV mapped to the five disciplines; persona outreach sequence.

EXIT CRITERIA

POV in CRM; ≥3 personas mapped; first meeting booked within 14 days.

MANAGER ACTIONS

Approve the POV for Tier 1; decide whether the CEO or an advisor should open the door.

COACHING FOCUS

Lead with an insight about their sites (demand-charge exposure, underused locations, a lost 30C credit), not a feature list.

ASSESSMENT QUESTIONS

Which sites or projects are most at risk financially? Who owns the investment decision? Is a partner (EPC) already engaged?

TOOLS

CRM (assumed); social-selling tool (assumed); federal station locator; utility tariff databases (GK); 10-K and ESG reports; Garallen Company Insights articles.

02

STAGE 2 OF 8

First Meeting / Discovery

Validate pains, quantify impact, map the decision process and data availability; earn the demo.

WORK PRODUCTS

Discovery notes in MEDDPICC-D format; pain → impact chain; data-availability checklist; agreed next step.

EXIT CRITERIA

Quantified pain (\$ capex, \$ energy and demand charges, utilization %, IRR gap, study cost/time); decision process and timeline; data owner named; demo booked.

MANAGER ACTIONS

Join Tier 1 calls; grade discovery; check that the finance pain (IRR, capex, opex) is quantified.

COACHING FOCUS

Ask "what happens if this project is built on today's spreadsheet?" Explore all five disciplines; confirm a direct or partner path.

ASSESSMENT QUESTIONS

What IRR or payback hurdle applies? What did the last study cost and how long did it take? Who supplies tariff, interval and telematics data?

TOOLS

Discovery guide (Section 03); scheduling link (sourced); five-discipline question bank.

03

STAGE 3 OF 8

Demo / Solution Presentation

Show the platform answering their question: a scenario on their site or fleet, a sample investor-grade report and the design-to-operate roadmap.

WORK PRODUCTS

Tailored demo (Project / Fleet / Hub / Microgrid workspaces); scenario comparison; sample report; Operate/Flex roadmap slide if relevant.

EXIT CRITERIA

Customer confirms ≥80% of decision criteria addressed; agrees to a pilot or assessment and to share data.

MANAGER ACTIONS

Ensure analyst support for technical buyers; rehearse the lender and finance angle for CFOs.

COACHING FOCUS

Demo outcomes (IRR, capex avoided, demand-charge reduction), not screens. Run a sensitivity or what-if live.

ASSESSMENT QUESTIONS

Did we show their numbers? Which stakeholder wasn't convinced? Did finance see the investor-grade output?

TOOLS

Demo tenant; sample reports (illustrative); BI dashboard views; launch demo recordings (S10).

04

STAGE 4 OF 8

Trial / Pilot

Prove value fast and cheaply: free Portfolio Screen (≤15 sites), paid site assessment, brownfield performance review or a single-hub Operate pilot.

WORK PRODUCTS

Pilot charter (Section 08); signed success criteria; data received; MAP v1 (Section 09).

EXIT CRITERIA

Charter signed; results delivered on time (one-business-day QA standard for standard reports); criteria met; agreement to a commercial proposal.

MANAGER ACTIONS

Approve scope, price and analyst capacity; refuse open-ended free work beyond the public free tier.

COACHING FOCUS

Tie the pilot to a real decision: which sites to build or upgrade, which fleet phase.

ASSESSMENT QUESTIONS

What decision does this pilot unlock? Who signs the follow-on? What is the budget source?

TOOLS

Portfolio Screen upload (S4); Garallen Plan; Operate sandbox (validate).

05

STAGE 5 OF 8

Value Validation

Help the buyer adopt a best-practice operating model: the five disciplines, living-plan re-evaluation and monetized sustainability.

WORK PRODUCTS

Five-discipline maturity readout; reference call (EPC brownfield or retail greenfield); operating model (who maintains the models and how often sites are re-evaluated).

EXIT CRITERIA

≥1 reference or peer proof completed; buyer accepts an ongoing (subscription) model.

MANAGER ACTIONS

Broker references; bring in the advisor with vertical credibility (utility, logistics, telematics).

COACHING FOCUS

Move the buyer from a one-off study to continuous optimization.

ASSESSMENT QUESTIONS

Has the economic buyer heard a peer story? Do they accept re-evaluating sites annually or when tariffs change?

TOOLS

Insights articles (S7); case studies (S11, S12); reference list (validate permissions).

06

STAGE 6 OF 8

Site Data Intake & Assessment

Collect and validate the data that drives model accuracy: tariffs, interval and billing data, grid capacity and interconnection status, site layout and rooftop, charger inventory and utilization, fleet telematics and routes.

WORK PRODUCTS

Completed data-intake checklist; assumptions log; data-gap plan (Garallen Company API defaults vs customer data); optional site-visit notes.

EXIT CRITERIA

All critical inputs received or defaults approved by the customer; assumptions log signed.

MANAGER ACTIONS

Escalate data blockers; confirm analyst capacity and turnaround.

COACHING FOCUS

Accuracy is the product. Document every assumption a lender or CFO will challenge.

ASSESSMENT QUESTIONS

Which inputs are defaults and which are measured? Is the utility interconnection status known? Are NDAs needed?

TOOLS

Secure upload; data-room checklist (Section 08); telematics exports; utility bills.

07

STAGE 7 OF 8

Pricing / Proposal

Deliver a value-based proposal with options (site pack, portfolio subscription, design plus Operate), an ROI case and terms.

WORK PRODUCTS

Proposal; ROI business case (Section 07); SOW for analyst QA and deliverables; data and security terms; partner pricing if partner-led.

EXIT CRITERIA

Proposal presented live to the economic buyer; preferred option chosen; paper process mapped; verbal yes.

MANAGER ACTIONS

Deal review (Section 06); approve discounts against guardrails; align partner margin.

COACHING FOCUS

Trade, don't discount: multi-site volume, term length, case-study rights, partner co-marketing.

ASSESSMENT QUESTIONS

What does a wrong site decision cost compared with our fee? Who else is being considered (consultant, vendor, competitor)?

TOOLS

Price book (Assumption, validate); ROI model; order form and MSA templates.

08

STAGE 8 OF 8

Close

Signed order, a smooth handoff to delivery and customer success, and an expansion plan already seeded.

WORK PRODUCTS

Signed order form / MSA / DPA; kickoff; workspace set-up; handoff doc; expansion hypothesis (Operate, Flex, more sites).

EXIT CRITERIA

Booked; kickoff within 5 business days; first deliverable date agreed; case-study or reference consent requested.

MANAGER ACTIONS

CEO/CRO thank-you call (Tier 1); win/loss review; case-study ask.

COACHING FOCUS

Close the mutual plan; avoid quarter-end discount pressure; set expansion trigger dates.

ASSESSMENT QUESTIONS

Is everything promised in the SOW? When is the first value moment?

TOOLS

CRM; e-signature (assumed); onboarding checklist.

Stage-gate quick checklist

- | | |
|--|---|
| ☐ Stage 1 → 2: POV + ≥3 personas + path (direct or partner) in CRM | ☐ Stage 2 → 3: Quantified pain + decision process + data owner + demo booked |
| ☐ Stage 3 → 4: Criteria confirmed; customer agrees to share data and run a pilot or assessment | ☐ Stage 4 → 5: Signed pilot charter with a decision date (or a documented skip) |
| ☐ Stage 5 → 6: Reference or peer proof done; ongoing-model approach accepted | ☐ Stage 6 → 7: Data intake complete; assumptions log signed |
| ☐ Stage 7 → 8: Proposal presented live; verbal yes; paper process mapped | ☐ Closed: Booked; kickoff ≤5 business days; case-study consent requested |

03 The End-to-End Sales Motion

This section turns the stages into daily work: where pipeline comes from, how to qualify it, how to run discovery by persona, how to demo and pilot, how to work with partners and executives, and how to spot a stalled deal before the forecast does.

MEDDPICC-D: why the extra D

MEDDPICC-D is MEDDPICC plus **D = Data readiness**: can the customer supply tariffs, interval data, telematics, and site and grid data in time? Model quality, and deal velocity, depend on it. This adaptation is specific to this playbook; validate it with RevOps.

3.1 Pipeline generation

Play	What good looks like	Key activities	Owners	Artifacts · Metrics	Red flags
Product-led: Portfolio Screen	Every free 15-site upload gets a human follow-up within 2 business days with a ranked-portfolio readout.	Monitor uploads; enrich the account; offer a 30-min results walkthrough; propose paid designs for the top sites.	AE / Sales Manager; Analyst	Portfolio Screen form (S4); CRM lead routing (assumed) · Upload → meeting %; upload → paid %	Uploads with no follow-up; free tier abused by vendors
Partner-sourced (EPCs, consultancies, integrators)	EPCs and consultancies use Garallen Company in their client proposals and register deals.	Partner enablement; co-selling; per-project partner pricing; joint case studies.	CRO / Partner lead	Deal registration (assumed); partner price list (Assumption) · % pipeline partner-sourced; partner win rate	Partner reselling without registration; channel conflict
Events & field marketing	Each event yields booked meetings, not just badge scans.	Pre-book meetings; advisor-staffed booths; 48-hour post-event follow-up; roadshow city meetups.	CRO, AE, Advisors, Marketing	Event calendar (S10, S17) · Meetings per event; pipeline \$ per event	No pre-booked meetings
Outbound by trigger	Sequences fire on triggers (Section 11): new state awards, CPO acquisitions, depot announcements, REIT ESG commitments, tariff changes.	Trigger monitoring; insight-led emails referencing the five disciplines; CEO and advisor intros.	AE	Social-selling tool; news alerts; Insights articles · Reply rate; meetings booked per week	Generic "demo request" outreach
Content & inbound	Insights and white papers convert to meetings.	Gate key assets; webinar series with trade media.	Marketing, AE	Insights library (S7); white paper (S21) · Inbound MQL → SQL %	Content with no CTA

3.2 Qualification: MEDDPICC-D

Element	What good looks like	Key activities	Owners	Artifacts · Metrics	Red flags
M · Metrics	Agreed numeric outcomes: IRR uplift, capex avoided, demand-charge reduction, utilization %, study time and cost saved, tCO2e.	Baseline from customer data; write targets into the pilot charter.	AE + Analyst	ROI model (Section 07) · % opps with documented metrics	"Better insight" without numbers
E · Economic Buyer	Met the budget owner: CFO / VP Finance, Head of Fleet, VP Network Development (CPO), Head of Asset Management (REIT), EPC principal, city sustainability director or CFO.	Executive meeting with CEO/CRO; confirm the budget source (opex software, project capex, grant).	AE + CRO/CEO	Exec brief · EB met by Stage 4	Only an analyst or engineer engaged by Stage 6

Element	What good looks like	Key activities	Owners	Artifacts · Metrics	Red flags
D · Decision Criteria	Criteria include accuracy and auditability, bankability (lender acceptance), speed, data security, integration (OCPP, OpenADR, BI), price and vendor viability.	Shape criteria toward bankable, deterministic, design-to-operate.	AE + Solutions	Criteria matrix · % criteria influenced	Lowest price only; "free design from the charger vendor" accepted
D · Decision Process	Steps mapped: champion → technical validation → finance review → procurement / IT security → signature (or partner → end-client approval).	Map in the MAP; find the security review early.	AE	MAP (Section 09) · Process documented by Stage 3	Unknown approvers
P · Paper Process	Order form / MSA, DPA (GDPR), security questionnaire, insurance, public procurement rules (cities: RFP or cooperative purchasing), partner subcontract terms.	Send standard docs at Stage 4; pre-fill the security pack.	AE + COO	MSA/DPA templates (validate); security pack (S8) · Days in legal/procurement	Public-sector RFP discovered at proposal
I · Identify Pain	Pain tied to money and risk: missed ROI, demand-charge bills, underused or failed sites, grid-upgrade delays, slow or expensive studies, lost federal credits.	Cost-of-inaction calculation; five-discipline diagnostic.	AE	Five disciplines (S7) · Pain quantified in \$	The pain is "curiosity"
C · Champion	An internal advocate with access (Director of EV Infrastructure, Fleet Electrification Manager, Asset Manager).	Champion tasks: share data, convene finance, arrange the EB meeting.	AE	Champion test log · Champion tested by Stage 3	Champion can't get data or the EB
C · Competition	Known alternatives: spreadsheets and in-house teams, engineering consultants, charger-vendor designs, telematics-led suitability tools, fleet-planning startups, microgrid design software, charging- and energy-management vendors.	Battlecards; trap-setting questions (grid co-optimization, bankability, brownfield re-evaluation).	AE + CRO	Battlecards (to build) · Win rate by competitor	"No competition" late in the cycle
D · Data readiness	Customer can provide required inputs within 2 weeks, or accepts API defaults with documented assumptions.	Data checklist at Stage 2; assign a data owner.	AE + Analyst	Data-intake checklist (Section 08) · Days to complete data	Data owner unknown; NDA delays

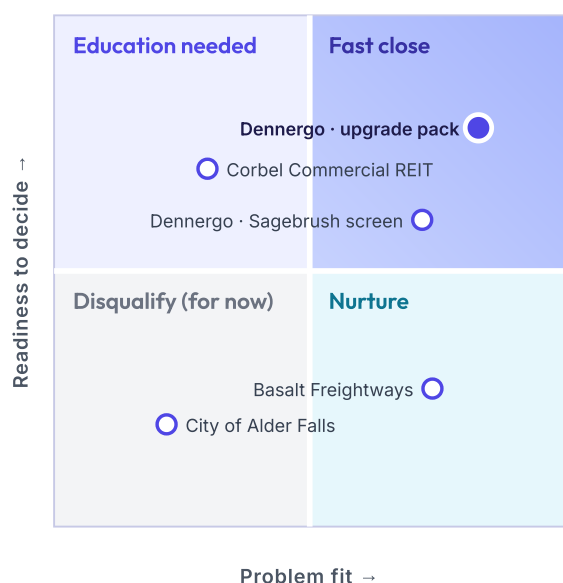


Figure 3.1 · Qualification matrix: plot every open opportunity by problem fit and readiness to decide.

Reading the matrix

- **Fast close** (strong fit, ready to decide): run the MAP, book the deal review, protect analyst capacity.
- **Education needed** (ready, fit unproven): lead with the five-discipline diagnostic and a peer story to prove the problem is worth solving.
- **Nurture** (strong fit, not ready): set a trigger watch (Section 11) and offer the Portfolio Screen or a partner referral. Don't spend analyst time yet.
- **Disqualify for now** (weak fit, not ready): close-lost with a trigger watch.

Dennergo today

Upgrade design pack: strong problem fit (41 sites under 8% utilization) and rising readiness (acquisition integration, lost 30C eligibility). Plotted in **Fast close**, pending EB confirmation.

3.3 Discovery by persona

Persona	What they know	Ask about	Owner	Artifact · Metric	Red flag
CPO · VP Network / Head of Operations	Utilization by site, demand-charge exposure, failures and downtime, expansion vs optimization plans.	Utilization distribution; worst-10 sites; \$ demand charges; battery plans; pricing strategy; grid-upgrade queue.	AE	Discovery guide · Discovery score $\geq 4/5$	No site-level data
Fleet · Head of Fleet / Fleet Electrification Manager	Fleet mix, duty cycles, replacement cycle, depot power, TCO targets.	Vehicles by type; routes and dwell; replacement schedule; depot capacity; impact of losing 45W; retrofit or conversion interest.	AE (+ telematics advisor)	Fleet workspace inputs · Vehicles and depots in scope	Pilot EVs bought before an infrastructure plan
Real estate · Asset/Portfolio Manager, Capital Planning	NOI uplift, tenant retention, capex discipline, compliance with tenant and regulatory electrification demands.	Properties by type; parking and rooftop availability; NOI targets; tenant EV requests; ESG commitments; existing EV, solar or storage.	AE	Portfolio Screen · Sites uploaded	"Vendors will install for free" mindset
EPC / professional services · Principal, Proposal or Engineering Lead	Needs faster, bankable proposals and differentiated bids.	Bids per year; hours per feasibility study; win rate; client financing requirements; O&M offering.	AE / Partner lead	Partner pricing · Projects per year	Sees Garallen Company as a competitor to its consulting
CFO / financier / energy developer	Needs IRR/NPV, sensitivities, bankable report acceptance and risk.	Hurdle rate; lender requirements and bankability standard; cost of capital; deal pipeline size.	AE + CEO	Sample investor-grade report · Lender requirements captured	Finance not engaged
City / municipality · Sustainability, Transit, Fleet	Needs emissions baselines, funding applications, stakeholder alignment and policy compliance.	Climate targets; grant deadlines; transit and municipal fleet size; public charging plans; procurement route.	AE (+ utility advisor)	Cities workflow (S6) · Grant deadline captured	No procurement path

3.4 Demo, pilot, partners and executives

Element	What good looks like	Key activities	Owners	Artifacts · Metrics	Red flags
DEMO					
Tailored scenario demo	Uses the customer's site or fleet (or a close proxy) and answers their decision question live with what-if scenarios.	Pre-call with the champion; prepare the scenario; show the investor-grade report and sensitivity; close on a pilot.	AE + Analyst	Demo tenant; sample reports · Demo → pilot %	Generic tour; no next step
PILOT					
Pilot with MAP	Charter with success criteria, data plan, decision date and commercial next step.	Charter → data intake → model run → one-day QA → readout → proposal.	AE + Analyst + Champion	Sections 08 & 09 · Pilot → win %	Free, open-ended analysis
PARTNER ENGAGEMENT					
EPCs & installers (e.g., Keystone Ridge Electric)	Garallen Company embedded in the EPC's feasibility and upgrade offerings.	Partner onboarding; per-project pricing; co-branded reports (validate); joint pursuit of CPO and retail portfolios.	CRO / Partner lead	Partner playbook · Partner projects per quarter	Partner withholds end-client access
Consultancies (e.g., Tidewell Mobility Advisors)	Consultants deliver strategy; Garallen Company powers the analytics.	Joint offers (free diagnostic → roadmap); referral and resale terms.	CRO	Referral agreement (assumed) · Referrals per quarter	Overlapping scopes

Element	What good looks like	Key activities	Owners	Artifacts · Metrics	Red flags
EV conversion, hardware & logistics partners (e.g., Brakeline)	Joint fleet-electrification packages.	Bundle analysis with conversion and charging offers while keeping the modelling vendor-neutral.	CRO, AE	Joint pitch · Joint opportunities	Perceived loss of neutrality
CPOs & site hosts as channel	Site host + CPO + EPC + Garallen Company as the design layer (the retail-rollout model).	Map all parties early; agree who pays (EPC, host or CPO).	AE	Stakeholder map · Multi-party deals closed	Unclear payer
EXECUTIVE ALIGNMENT					
CEO / CRO / advisor sponsorship	Every Tier 1 deal has an exec sponsor; vertical advisors join key meetings (utilities: Marcus Hale; logistics: Doug Arnett; fleet telematics: Sana Qureshi).	Exec-to-exec call at Stage 2–3 and before the proposal; an advisory-board-style session for strategic accounts.	CEO, CRO, Advisors	Exec brief template · Exec touches per Tier 1	Executives appear only at escalation

3.5 Champion test

REAL CHAMPION

Sells for you when you're not in the room

- **Information:** shares the pain, the politics, the competition and the hurdles
- **Access:** introduces you to the EB, finance and IT, and answers by text
- **Credibility:** has delivered a capital project before; others trust their judgement
- **Personal win:** their metrics (uptime, NOI, fleet TCO) improve if you win

COACH, NOT CHAMPION

Friendly, but cannot move the deal

- **Gatekeeper:** everything must go through them; restricts information
- **Low credibility:** process keeps changing; overpromises; no-shows
- **No stake:** "loves the demo" with no outcome they own
- **Friend zone:** "a colleague might be interested"

Four-question test (ask by Stage 3)

1) Do they win personally if Garallen Company is chosen? 2) Can they reach the economic buyer? 3) Have they brought you into a room you couldn't enter yourself? 4) Have they warned you about an internal risk or objection?

If any answer is no, you have a coach. Keep the coach, and keep looking for the champion.

3.6 Stalled-deal indicators and recovery

LEADING INDICATORS · REVIEW WEEKLY

Triage any stall within 7 days

- No customer action in 14 days
- Data not delivered within 2 weeks
- EB not met by Stage 5
- Pilot running without a decision date
- "Waiting on grants or policy"
- Partner went silent
- Security review not started 30 days before close
- Champion left the company
- **Owners:** AE + CRO · **Tools:** MAP, CRM stage aging · **Metric:** stage age vs benchmark

Stalled-deal recovery playbook

- ☐ Re-quantify the cost of inaction with a fresh scenario (post-30C economics, a new tariff)
- ☐ Offer a smaller decision: a 3-site assessment or a single-site upgrade case
- ☐ Go exec-to-exec (CEO, CRO or the relevant advisor)
- ☐ Unblock data: accept API defaults with documented assumptions
- ☐ No movement in 30 days: downgrade the forecast and nurture with trigger alerts

Stall signal → likely cause → first move

Signal	Most likely cause	First recovery move	Owner · within
No customer action in 14 days	The decision question was never agreed; the deal is "interesting", not urgent	Re-send the one-page decision question with a cost-of-delay number; ask the champion to confirm or kill it	AE · 2 days
Data not delivered within 2 weeks	Data owner unnamed, or IT has not cleared the NDA/DPA	Offer API defaults with documented assumptions; book 30 minutes with the data owner and IT together	AE + Analyst · 3 days
EB not met by Stage 5	Champion lacks access, or is protecting the project	Run the champion test again; propose an exec-to-exec note the champion can forward	AE + CRO · 5 days
Pilot running without a decision date	Charter signed without a dated go/no-go	Re-issue the charter with a readout date and the decision it will trigger	AE · 2 days
"Waiting on grants or policy"	The business case only works with incentives	Re-model incentive-neutral; show the sites that pencil without credits	Analyst · 5 days
Security review not started 30 days out	Paper process not mapped in the MAP	Send the standard security pack pre-filled; name the reviewer in the MAP	AE + COO · 3 days
Champion left the company	Single-threaded deal	Re-open with the EB using the readout; identify a new champion from the committee map	AE + CRO · 7 days

Plan & Prioritize

Territories and a fully worked Tier 1 account plan.

04 Territory Planning

05 Account Plan: Dennergo

SECTION 04 · WHERE TO HUNT, IN WHAT ORDER, WITH WHAT CAPACITY

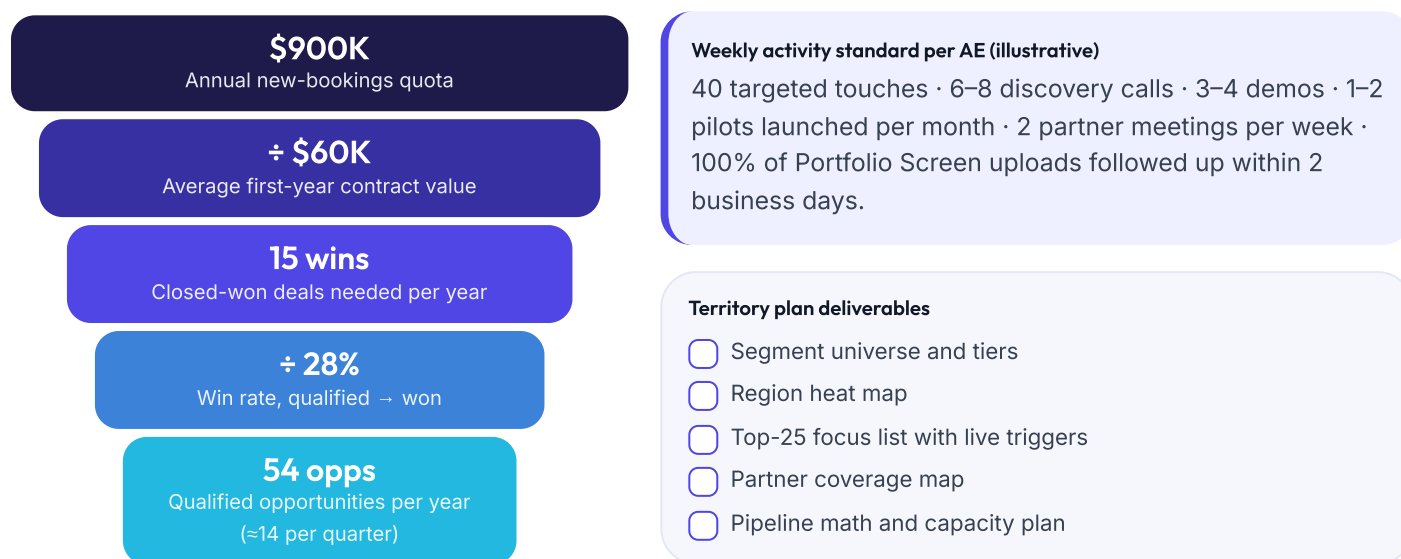
04 Territory Planning

With a small team, territories are best cut by segment and region (for example: Mountain West and California CPO/retail; national REIT/CRE; fleets and logistics; Canada). Targets below are illustrative assumptions. Calibrate them to quota and to capacity, including analyst QA capacity, which is the real constraint on how many pilots can run at once.

Step	Activity	Data sources	Output	Cadence	Target (illustrative)
1 · Research	Build the universe per segment: CPOs (by site count), EPCs and installers, REITs and multi-site owners, fleets of 50+ vehicles, cities and transit agencies, energy developers and financiers.	Federal station data; REIT lists; fleet databases; state funding award lists; trade-show attendee lists; professional networks	Account universe by segment and region	Annual + quarterly	100% of accounts segmented
2 · Market priority	Prioritize regions with high charger density, aging networks, high demand charges and active incentives (Mountain West and California first, per S11).	Station data; utility tariffs; reliability studies; state programs	Region heat map	Semi-annual	Top-5 regions defined
3 · Whitespace	For each account: sites and depots not yet analyzed; modules not owned (Plan, Operate, Flex).	CRM; customer workspaces	Whitespace matrix	Quarterly	Whitespace $\geq 4 \times$ quota
4 · Tiering	Apply the Section 10 model.	Steps 1–3	Tier list	Annual + on trigger	Tier 1 ≤ 10 accounts per AE
5 · Partner map	Assign EPCs, consultancies and hardware partners by region and segment.	Partner list	Partner coverage map	Semi-annual	≥ 2 active partners in each top region
6 · Activity plan	Weekly activity standards.	CRM	Activity targets	Weekly	See activity standard below
7 · Pipeline math	Quota $\div$ win rate $\div$ ACV; cycle length by segment (partner per-project 2–6 wks; CPO/REIT portfolio 1–4 mo; fleet/city 3–9 mo, Assumption).	CRM history	Pipeline target	Quarterly	Coverage $\geq 3 \times$
8 · Capacity check	Match booked pilots and projects to analyst QA capacity (one-business-day standard).	Delivery calendar	Capacity plan	Bi-weekly	No pilot starts without a capacity slot
9 · Review	Territory QBR.	All of the above	QBR deck	Quarterly	Plan vs actual; mix of projects, subscriptions and Operate

Region	Charger density	Aging network	Demand charges	Active incentives	Partner coverage	Total
California Top 5	5	5	5	4	3	22
Mountain West Top 5	3	4	4	3	5	19
Northeast Top 5	4	4	5	4	1	18
Pacific Northwest Top 5	4	4	3	4	2	17
Texas Top 5	4	3	4	2	2	15
Southeast	3	3	3	2	1	12
Midwest	3	2	3	2	2	12

Figure 4.1 · Region heat map (illustrative scores, 1 = weak, 5 = strong). The top five regions get named partners and Tier 1 coverage first.



Hold ≥3× coverage: ≈\$675K open qualified pipeline against a \$225K quarterly target.

Figure 4.2 · Pipeline math for one AE (illustrative).

SECTION 05 · THE TEMPLATE, FILLED IN FOR A LIVE TIER 1 ACCOUNT

05 Account Plan: Dennergo

Required for Tier 1 (all sections) and Tier 2 (sections A–F). Keep it to two pages and update it in the CRM. The right-hand example column is the live plan for Dennergo; use it as the standard for depth.



Dennergo
Tier 1 · Score 87 · Motion C

FICTIONAL ACCOUNT

SEGMENT
Regional charge point operator (CPO)

FOOTPRINT
132 DC fast-charging sites (586 ports, 150–350 kW) in UT, CO, AZ, NV, NM + 40 Level 2 destination sites

BUDGET CYCLE
Calendar FY; FY27 budget locks mid-December; monthly capex committee

HQ
Salt Lake City, UT · ~210 employees · founded 2017

OWNERSHIP
Backed by an infrastructure fund (Ridgeline Infrastructure Partners); board approves capex over \$250K

LIVE TRIGGERS
Acquired the 22-site Sagebrush Fastcharge network (Aug 2026) · 14 planned builds lost 30C eligibility · new CFO (Jul 2026) · utility rate case filed (Sep 2026)

Section	Field	What to capture	Dennergo example (illustrative)	Owner	Update
A. Account overview	Profile	Segment, HQ, regions, number of sites / depots / properties, EV program stage, budget cycle.	Regional CPO: 132 DCFC sites in 5 Mountain West states (+22 acquired); FY = calendar year; budget locks mid-December.	AE	Annual
	Strategic priorities	Growth vs optimization; ESG targets; funding dependencies.	Shift from expansion to optimizing aging sites; integrate the Sagebrush network; 14 2H-2026 builds lost 30C eligibility.	AE	Annual
B. Asset footprint	Sites / fleet / portfolio	Count, types, chargers (kW), utilization, storage/solar, grid constraints; fleet by vehicle type.	Network utilization 11%; 41 sites under 8%; 17 sites where demand charges exceed 40% of the energy bill; 9 sites reach end of hardware warranty in 2027.	AE + Analyst	Semi-annual
	Garallen Company coverage	Sites analyzed, modules used, workspaces and users, Operate-connected hubs.	31 sites analyzed with Plan (via Keystone Ridge Electric, Apr 2026); 0 on Operate; 2 users.	CS / AE	Quarterly
C. Relationship map	Buying committee	EB, champion, technical, finance, procurement/IT, blockers; sentiment.	VP Network Development Daniel Okafor (EB); Director Site Operations Rachel Lindqvist (champion); CFO Martin Shaw (approver). See Figure 5.1.	AE	Monthly
	Ecosystem	EPCs, site hosts, utilities, financiers, hardware vendors.	EPC partner: Keystone Ridge Electric; utility: a Mountain West investor-owned utility; fund owner and an infrastructure lender.	AE	Quarterly
D. Opportunity map	Active & planned	Opportunity, module, sites, \$, stage, close date, path (direct or partner).	Upgrade design pack + Operate pilot, 18 sites, \$96.0K (Stage 4, Jan 29); pipeline re-model, 14 sites, \$33.6K (Stage 3, Dec 18); Sagebrush screen, 22 sites, \$26.4K (Stage 2, Dec 18).	AE	Weekly
	Whitespace	Remaining sites, new regions, Operate/Flex, more users and teams.	123 sites not yet analyzed (incl. 22 acquired); Operate on 17 high-demand-charge sites; Flex eligibility on 9 sites with planned storage (validate).	AE	Quarterly

Section	Field	What to capture	Dennergo example (illustrative)	Owner	Update
E. Value hypotheses	Top 3, quantified	Quantified (Section 07).	H1 +6% revenue on 18 bottom-quartile sites (\$227K/yr; conservative vs the 18–24% vendor claim). H2 –15% demand charges (\$140K/yr). H3 \$330K capex avoided by redesigning 2 of 14 pipeline builds.	AE + Analyst	Quarterly
F. Competitive position	Alternatives	Incumbent tools, consultants, vendor designs; competitors.	In-house spreadsheet model + a regional engineering firm (~\$8K and 6–8 weeks per study); evaluating a charging-management platform's assessment add-on.	AE	Quarterly
G. Strategy	Land / expand motion	Pick from Section 12.	Motion C: brownfield review → upgrade designs → Operate → Flex.	AE + CRO	Quarterly
	Exec alignment	Exec sponsor and advisor; meeting plan.	CEO Lena Marchetti ↔ CEO Teresa Valdez; CRO Owen Becker ↔ CFO Martin Shaw; advisor Marcus Hale on interconnection strategy.	CRO	Semi-annual
H. 90-day actions	Action / owner / date	Concrete next steps.	31-site readout (Oct 30); CEO-to-CEO call (Nov 10); MAP kickoff (Nov 19); Operate pilot charter (Dec 4). Full list below.	AE	Bi-weekly
I. Risks & asks	Risks; resource needs	Analyst capacity, data access, policy shifts, vendor-viability concerns.	Need 2 analyst-weeks Nov–Dec; security questionnaire; Sagebrush interval data missing on 9 sites; possible fund-level capex freeze until the Q1 board.	AE	Monthly
J. KPIs	Account KPIs	ARR/bookings, sites analyzed, modules adopted, realized savings, NPS, reference status.	Sites analyzed 31 → 71 (Q1 2027) → 154 (Q4 2027); first Operate hub live Apr 2027; reference-ready by Q3 2027.	AE / CS	Quarterly

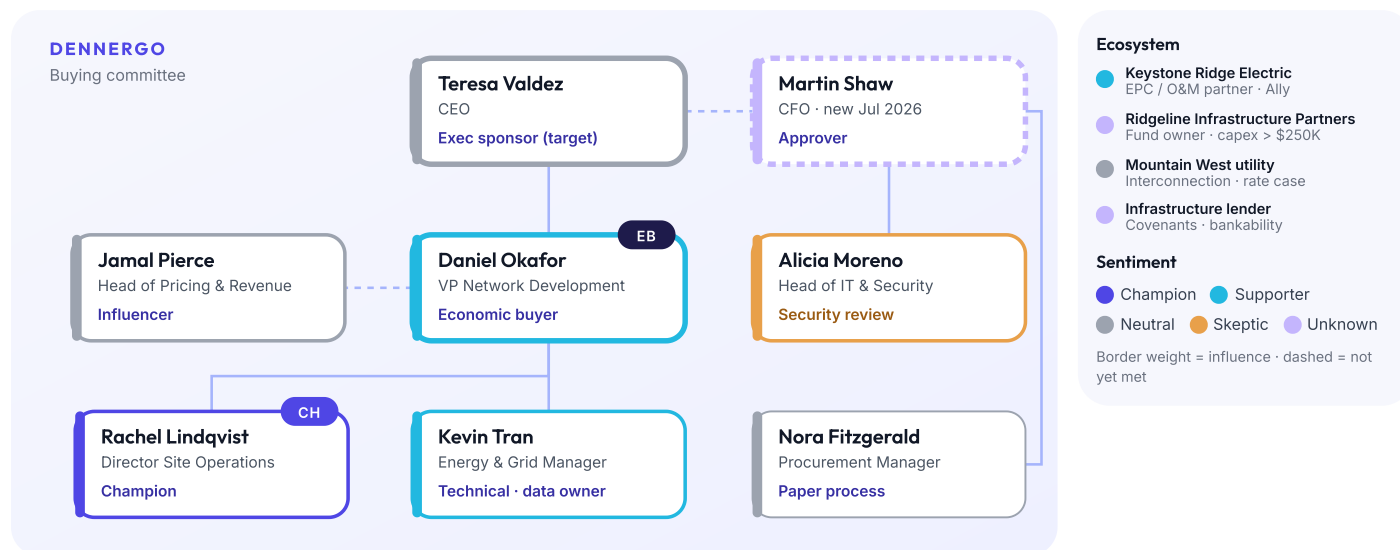


Figure 5.1 · Dennergo buying committee and ecosystem. Colour shows sentiment; ring weight shows influence on the decision.

Stakeholder	Role in decision	Sentiment	Influence	What they need to hear · our next move
Teresa Valdez, CEO	Executive sponsor (target)	Neutral	High	Integration of Sagebrush without new capex risk. CEO-to-CEO call Nov 10 with a one-page POV.
Martin Shaw, CFO (new, Jul 2026)	Approver; owns hurdle rate	Unknown	High	Board-ready IRR on the 14 pipeline builds after losing 30C. CRO intro via champion; send a sample investor-grade report.
Daniel Okafor, VP Network Development	Economic buyer	Supporter	High	Which sites to upgrade, which to sell or retire. Readout Oct 30; confirm budget source (opex vs project capex).
Rachel Lindqvist, Director Site Operations	Champion	Champion	Med-High	Fewer failing sites and demand-charge surprises. Champion test passed 4/4 (Oct 9).

Stakeholder	Role in decision	Sentiment	Influence	What they need to hear · our next move
Kevin Tran , Energy & Grid Manager	Technical evaluator; data owner	Supporter	Medium	Auditable tariff and storage models. Owns interval data; data request Nov 6.
Jamal Pierce , Head of Pricing & Revenue	Influencer	Neutral	Medium	Pricing scenarios per site. Include pricing what-ifs in the demo.
Alicia Moreno , Head of IT & Security	Security review; potential blocker	Skeptic	Medium	Data handling, access control, certifications. Send security pack Dec 1; no unconfirmed claims.
Nora Fitzgerald , Procurement Manager	Paper process	Neutral	Low-Med	Standard MSA/DPA and vendor onboarding. Send templates at Stage 4.
Sam Delgado , PM, Keystone Ridge Electric	Partner (EPC/O&M)	Supporter	Medium	Upgrade work for his crews. Agree who contracts and partner margin by Nov 19.

90-day action plan

Date	Action	Owner	Status
Oct 30	Readout of the 31-site analysis to Okafor and Lindqvist; agree the 18-site upgrade scope	AE + Analyst lead	Scheduled
Nov 6	Data request: 18 upgrade sites + 22 Sagebrush sites (tariffs, 12 months of interval data, sessions)	AE; Tran (customer)	Planned
Nov 10	CEO-to-CEO call: integration POV and post-30C pipeline risk	Marchetti ↔ Valdez	Planned
Nov 19	MAP kickoff; partner roles and margin agreed with Keystone Ridge	AE; Lindqvist; Delgado	Planned
Dec 1	Security pack and standard MSA/DPA sent	COO; Moreno; Fitzgerald	Planned
Dec 4	Operate pilot charter signed for the St. George hub	AE; Lindqvist	Planned
Dec 18	Pipeline re-model and Sagebrush screen delivered; CFO preview	Analyst lead; Shaw	Planned
Jan 12	Readout with EB and CFO; proposal options presented	AE + CEO	Planned

Account plan quality check

- | | | |
|---|--|--|
| ☐ Asset footprint quantified | ☐ EB identified and met | ☐ ≥3 quantified hypotheses |
| ☐ Whitespace sized | ☐ 90-day plan with owners | ☐ Exec sponsor and advisor named (Tier 1) |

Win the Deal

Deal review, business case, pilots and the mutual action plan.

06 Opportunity & Deal Review

07 Business Case, ROI & TCO

08 Pilot Setup & Checklists

09 Mutual Action Plan

SECTION 06 · TWENTY MINUTES THAT DECIDE THE FORECAST

06 Opportunity & Deal Review

Run a review for every opportunity of \$25K or more in first-year value (illustrative threshold), every Tier 1 deal, and before anything moves to Commit. Twenty minutes: the AE presents, the CRO challenges, the analyst lead joins for scope and capacity.



Figure 6.1 · Live example: Dennergo upgrade design pack scores 12/18 (Best Case).

Review area	Question	Evidence required	Red flag	Next-action owner
Metrics	What numeric outcome did the customer agree to?	Pilot charter or email with baseline and target	"Insight" with no number	AE + Analyst
Economic Buyer	Who signs, and have we met them?	Meeting notes; budget source	Only analyst-level contact	AE + CRO/CEO
Decision Criteria	Top 5 criteria, and our rank against the alternatives?	Criteria matrix validated by the champion	Price-only; benchmark is a free vendor design	AE
Decision Process	Steps and dates to signature (including partner or end client)?	MAP with customer dates	Unknown approvers	AE
Paper Process	MSA / DPA / security questionnaire / procurement route?	Docs sent; reviewer named	Public RFP surprise; security not started	AE + COO
Identify Pain	What does inaction cost?	Quantified \$ (capex, opex, IRR gap)	Pain not owned by the EB	AE
Champion	What has the champion done for us?	Champion action log	Champion lacks access	AE
Competition	Alternatives, including spreadsheets, consultants and vendor designs?	Competitive notes	"No competition"	AE
Data Readiness	Is data in hand, or are defaults approved?	Data checklist status	Data more than 2 weeks late	AE + Analyst
Scope & Capacity	Is the SOW clear and analyst capacity booked?	SOW; delivery calendar	Custom work not priced	Analyst lead / COO
Product Fit	Does the deal need Operate/Flex capabilities or integrations that are not GA?	Product sign-off	Roadmap selling	CRO + R&D lead

Review area	Question	Evidence required	Red flag	Next-action owner
Partner Dynamics	If partner-led: who pays, who owns the end client, what margin?	Partner agreement / registration	Unclear payer; channel conflict	CRO
Commercials	Discount against guardrails; what did we get in trade (term, sites, case study)?	Pricing approval	Unilateral discount	CRO
Forecast	Are category and date justified?	Score; MAP progress	Close date slipped twice or more	CRO

DENNERGO REVIEW · OCT 21, 2026

Top 3 risks and mitigations

- **CFO not engaged (E=1):** CRO-to-CFO intro via Lindqvist; send sample investor-grade report. Owner: Becker · Nov 13
- **Security not started (P=0):** send the security pack and MSA/DPA early. Owner: COO · Dec 1
- **Sagebrush data gaps (D=1):** approve API defaults for 9 sites, documented in the assumptions log. Owner: Analyst lead · Nov 20

Deal review outputs

- ☐ Updated MEDDPICC-D score
- ☐ Top 3 risks with mitigation owner and date
- ☐ Forecast category
- ☐ Resource asks (executive, analyst, legal)
- ☐ Next review date

SECTION 07 · TWO BUSINESS CASES, ONE STORY

07 Business Case, ROI & TCO

Two business cases matter: the customer's project case (IRR, NPV and TCO of the site or fleet), which Garallen Company produces, and the case for buying it: better, faster decisions versus the fee. Sellers own the second and use the first as proof.

US incentive check (\$20)

No 30C for property placed in service after Jun 30, 2026; no 45W for vehicles acquired after Sep 30, 2025; federal charging-program funds continue via state plans, but part of the unobligated balance was redirected. Re-modelling projects that assumed these incentives is a timely lever; confirm with the customer's tax advisors.

Value lever	Metric	Calculation / method	Typical inputs	Garallen Company proof point / capability	Source · confidence
Study speed & cost	Weeks saved; \$ consultant cost avoided	(Hours per study × loaded rate, or consultant fee) – Garallen Company fee; cycle time before and after	Studies per year; current cost per study	Scenarios "6–8× faster and at lower cost"; results in minutes + QA in about one business day	S1, S3 · vendor claim
Capex avoided (right-sizing)	\$ capex	Overbuilt chargers, storage or grid upgrades avoided vs the baseline design	Baseline design; equipment quotes	Interconnection feasibility, storage and hub sizing; "avoid overbuilding and misplaced capex"	S1, S4
Site-selection quality	Portfolio NPV; sites rejected	Σ NPV of selected sites vs naive selection; losses avoided on rejected sites	Candidate sites, traffic, competition	Portfolio Screen; the 24-store retail program evaluation	S4, S12
Utilization / revenue	Revenue uplift %	Δ sessions × price; optimal pricing scenarios	Session data; pricing	Utilization forecasting; pricing optimization; 18–24% on re-evaluated sites (company claim)	S5, S7, S11
Energy & demand charges	\$ opex reduction	Demand-charge reduction from smart charging, storage, solar; time-of-use shifting	Interval data; tariffs	Plan tariff/storage/solar modelling; Operate continuous cost minimization	S1, S7
Grid-upgrade timing	Months saved; \$ upgrade avoided	Compare grid upgrade vs microgrid vs managed-charging scenarios	Utility capacity; quotes	"Integrate with the grid, request an upgrade, or build an EV-integrated grid" decision	S5, S6
Fleet TCO	\$/mile; TCO delta ICE vs EV	Vehicle + energy + maintenance + infrastructure over the horizon	Fleet data; duty cycles	Fleet workspace: optimal fleet size, schedule, vehicle TCO	S3, S5
Financing / bankability	Time to financial close; cost of capital	Faster lender approval; lower risk premium (qualitative unless the lender confirms)	Lender requirements	Investor-grade report; bankability formats on request; deterministic, auditable engine	S3
Flexibility revenue	\$ per kW-yr	Demand-response, ancillary and wholesale revenue from aggregated storage and EV load	Grid operator / utility program rules	Garallen Flex	S1 · validate availability
Sustainability monetization	\$ credits; tCO ₂ e	Carbon credits, RECs and clean-fuel-standard credits embedded in the model	Energy mix; program rules	"Monetized sustainability" discipline; automated carbon calculations	S7, S14, GK
Risk reduction	Downside IRR (P90)	Sensitivity on tariffs, utilization, interest rates, incentives	Assumption ranges	Scenario-comparison engine; sensitivity analysis	S3, S14
Ongoing re-optimization	Annual value of a model refresh	Value of decisions after tariff, policy or hardware changes, without new consulting	Change events per year	"Living plan" re-optimization; continuously updated data	S7, S5

Worked example: Dennergo, 18 bottom-quartile DCFC sites

Illustrative. Replace with the customer's data; the Garallen Company fee is a placeholder until the price book is confirmed.

#	Assumption / input	Value	Note
1	Sites in scope	18 operating DCFC sites	Brownfield optimization
2	Avg charging revenue per site	\$210,000 / yr	Customer data
3	Revenue uplift (re-sizing, pricing, ops)	6% → \$226,800 / yr	Conservative vs the 18–24% claim
4	Avg demand charges per site	\$52,000 / yr	From bills and interval data
5	Demand-charge reduction	15% → \$140,400 / yr	Validate per tariff
6	Capex avoided	2 builds × \$165,000 = \$330,000	One-time; redesigned pipeline sites
7	Consultant studies avoided	18 × \$8,000 = \$144,000	One-time; plus 6–8 weeks saved
8	Year-1 gross benefit	\$841,200	3 + 5 + 6 + 7
9	Recurring annual benefit	\$367,200 / yr	3 + 5
10	Garallen Company fee (placeholder)	\$96,000 year 1	Validate with the price book
11	Year-1 ROI	≈ 7.8×	(8 – 10) ÷ 10
12	Not monetized	Financing speed, Flex revenue, carbon credits	Add if the customer can quantify

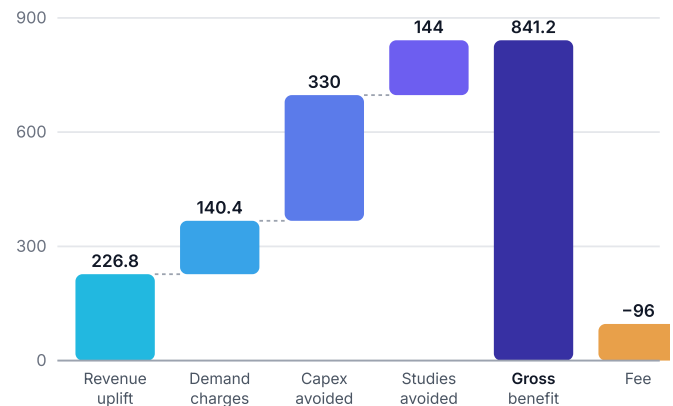


Figure 7.1 · Year-1 benefit build vs fee (\$K, illustrative).



Figure 7.2 · Downside, base and upside cases (Year-1 ROI).

Sensitivity: always show the downside

Case	Revenue uplift	Demand-charge cut	Capex avoided	Studies avoided	Year-1 gross	Year-1 ROI
Downside (P90)	3% · \$113,400	8% · \$74,880	1 build · \$165,000	\$144,000	\$497,280	4.2×
Base	6% · \$226,800	15% · \$140,400	2 builds · \$330,000	\$144,000	\$841,200	7.8×
Upside	10% · \$378,000	22% · \$205,920	3 builds · \$495,000	\$144,000	\$1,222,920	11.7×

Business case checklist

- ☐ Use customer data where possible; label every default
- ☐ Incentive assumptions reflect current law (30C / 45W / federal program status)
- ☐ Separate one-time from recurring benefits
- ☐ Customer validated rates, utilization and hurdle rate
- ☐ Show the downside (sensitivity) case
- ☐ Champion and finance have acknowledged the case

SECTION 08 · PROVE VALUE FAST, CHEAPLY AND TOWARD A DECISION

08 Pilot Setup & Checklists

Default policy: free only within the public Portfolio Screen tier (≤ 15 sites). Every other pilot is paid, or credited against a follow-on order (policy is an Assumption; validate). Standard deliverable SLA: results QA-reviewed within about one business day of complete data (S3).

Pilot type	When to use	Scope & duration	Success criteria (examples)	Customer commitments	Garallen Company resources	Exit to commercial
Portfolio Screen (self-serve)	REITs, property owners and multi-site retailers exploring EV, solar or storage	≤ 15 addresses; same day to a few days; \$45 per additional site	Ranked list with latent-value estimates; ≥ 3 sites worth deeper design	Upload a spreadsheet; 30-min readout	Automated + AE readout	Paid Plan designs for top sites; portfolio subscription
Paid greenfield site assessment	CPO, EPC or retailer deciding where and what to build	1–5 sites; 1–3 weeks	Investor-grade report per site; go/no-go; IRR/NPV ranges accepted by finance	Site data, tariffs, budget owner at the readout	Analyst QA; AE	Multi-site pack or subscription
Brownfield performance review	CPOs with aging or underperforming sites (EPC-partner model)	10–40 sites; 3–8 weeks	Sites ranked by upside; upgrade designs (chargers, storage, ops); quantified uplift	Utilization and session data, bills, charger inventory	Analyst team; CEO/CRO readout	Upgrade designs + Operate on upgraded sites
Fleet transition study	Fleets planning ICE → EV for a depot or region	1 depot or fleet segment; 2–6 weeks	Optimal fleet mix and schedule; depot charging and grid plan; TCO	Telematics and route data, vehicle list, depot electrical info	Analyst; telematics advisor	Multi-depot rollout; Operate at the depot
City / transit planning study	Municipalities needing funding-ready plans	Program level; 4–8 weeks	Emissions baseline and reduction; funding-application-ready financials	Fleet and site data; procurement path	Analyst; utility advisor	Platform access for departments; ongoing reporting
EPC partner trial	EPCs and consultants evaluating Garallen Company for bids	2–3 live bids; 30–60 days	Proposal time down; win rate; client acceptance of the report	Real bids; partner agreement	Partner lead; analyst	Partner subscription or per-project agreement
Operate single-hub pilot	A built hub with storage/solar or demand-charge issues	1 hub; 60–90 days	Electricity cost down vs baseline; uptime; data integration (OCPP / SCADA)	Network / SCADA access; site operator	R&D integration engineer (validate GA status)	Operate subscription across hubs
Flex eligibility assessment	Portfolios with storage or flexible load in active markets	Portfolio; 2–4 weeks	Eligible MW; projected \$/kW-yr; program pathway	Asset list; interconnection details	Analyst; utility advisor	Flex enrollment (validate availability)

Pilot charter · Dennergo brownfield performance review

SAMPLE

DECISION QUESTION	Which of the 18 bottom-quartile sites should Dennergo upgrade, re-price or retire in FY27, and in what order?
SCOPE	18 operating DCFC sites (UT, CO, AZ); 4 weeks; Plan brownfield workflow + analyst QA
SUCCESS CRITERIA	Sites ranked by upside; ≥12 sites with a positive upgrade case at Dennergo's 11% hurdle; modelled uplift within ±10% of actuals on 3 back-tested sites
DATA	12 months of tariffs and interval data, sessions, charger inventory; owner: Kevin Tran; due Dec 11
DECISION MAKER / DATE	Daniel Okafor (EB) with Martin Shaw (CFO) · readout Jan 12, 2027
COMMERCIAL NEXT STEP	Upgrade design pack + Operate pilot (Section 07 options), signature target Jan 29, 2027
PRICE	\$9,600, credited in full against an order signed by Jan 29, 2027

Dennergo · Daniel Okafor

Garallen Company · Account Executive

SIX PILOT SUCCESS FACTORS

If one is missing, it's a free consulting project

- **Skin in the game:** paid, or credited, with customer time committed
- **Defined, measurable criteria** signed before kickoff
- **The right players:** EB and finance at the readout
- **Approvals in place:** NDA/DPA and IT access before data moves
- **Timeline:** kickoff, mid-point and readout dates on the MAP
- **Agreed next step** if the criteria are met

Pilot setup and data-intake checklist

- ☐ Charter signed: decision question, scope, success criteria, decision date, decision maker, commercial next step
- ☐ NDA/DPA in place if customer data is sensitive (GDPR and anonymization, S8)
- ☐ Data received: tariffs and bills (12 months), interval data, charger inventory and sessions, site layout / parking / rooftop, grid capacity and interconnection status, fleet telematics and routes, financial assumptions (rates, hurdle)
- ☐ Assumptions log created; API defaults approved by the customer
- ☐ Analyst capacity slot booked; QA SLA communicated
- ☐ Mid-point check-in; final readout with the EB and finance
- ☐ Readout deck: results vs criteria, \$ impact, recommendation, proposal
- ☐ Case-study and reference consent requested at the readout

SECTION 09 · ONE SHARED PLAN FROM KICKOFF TO THE 90-DAY VALUE REVIEW

09 Mutual Action Plan

Shared with the customer, and with the partner where relevant. The example is Dennergo's brownfield review → upgrade designs → Operate path. Dates are relative to target signature (T = Fri Jan 29, 2027), with calendar dates for this account. Partner-led deals add an end-client approval milestone.

Phase	Milestone	Customer owner	Garallen Company owner	Partner owner	Target · date	Exit evidence
Align	Kickoff: decision question, success criteria, timeline	Rachel Lindqvist (champion)	AE	Keystone Ridge PM	T-10 wks · Nov 19	MAP v1 agreed
Align	Executive alignment call	Daniel Okafor (EB)	CEO / CRO	—	T-9 wks · Dec 1	EB confirms priority and budget
Data	Data request and NDA/DPA	Kevin Tran; Legal	AE + Analyst	Keystone Ridge	T-9 → T-7 wks · Dec 1-11	Data checklist complete
Prove	Pilot / assessment run + QA	Champion	Analyst lead	—	T-7 → T-4 wks · Dec 14-Jan 8	Results delivered
Prove	Readout with EB and finance	Okafor, Shaw	AE + Analyst + CEO	Keystone Ridge	T-4 wks · Jan 12	Agreement on value and next step
Validate	Reference call	Okafor	AE	—	T-4 wks · Jan 14	Reference completed
Propose	Proposal and ROI review (site pack / subscription / Operate)	Okafor; Finance	AE	Partner pricing	T-3 wks · Jan 19	Preferred option chosen
Decide	Security questionnaire and procurement	Moreno; Fitzgerald	COO / AE	—	T-3 → T-1 wks · Jan 11-27	Security approved
Decide	Legal (MSA / DPA / order form)	Legal	COO	—	T-2 wks → T · Jan 18-29	Redlines closed
Decide	Signature	Okafor (EB)	AE	—	T · Jan 29	Signed order
Deliver	Onboarding: workspace, users, data connections	Champion	CS / Analyst	Keystone Ridge	T+1 wk · Feb 5	Users active
Deliver	First deliverable: upgrade designs	Champion	Analyst	Keystone Ridge	T+2 → T+6 wks · Feb 12-Mar 12	Designs accepted
Operate	Operate go-live on the first upgraded hub	Site Ops	R&D integration	Keystone Ridge O&M	Per plan · Apr 2027	Hub live; baseline set
Expand	90-day value review and expansion plan	Okafor	AE / CEO	—	T+90 days · Apr 29	Value report; next sites and modules

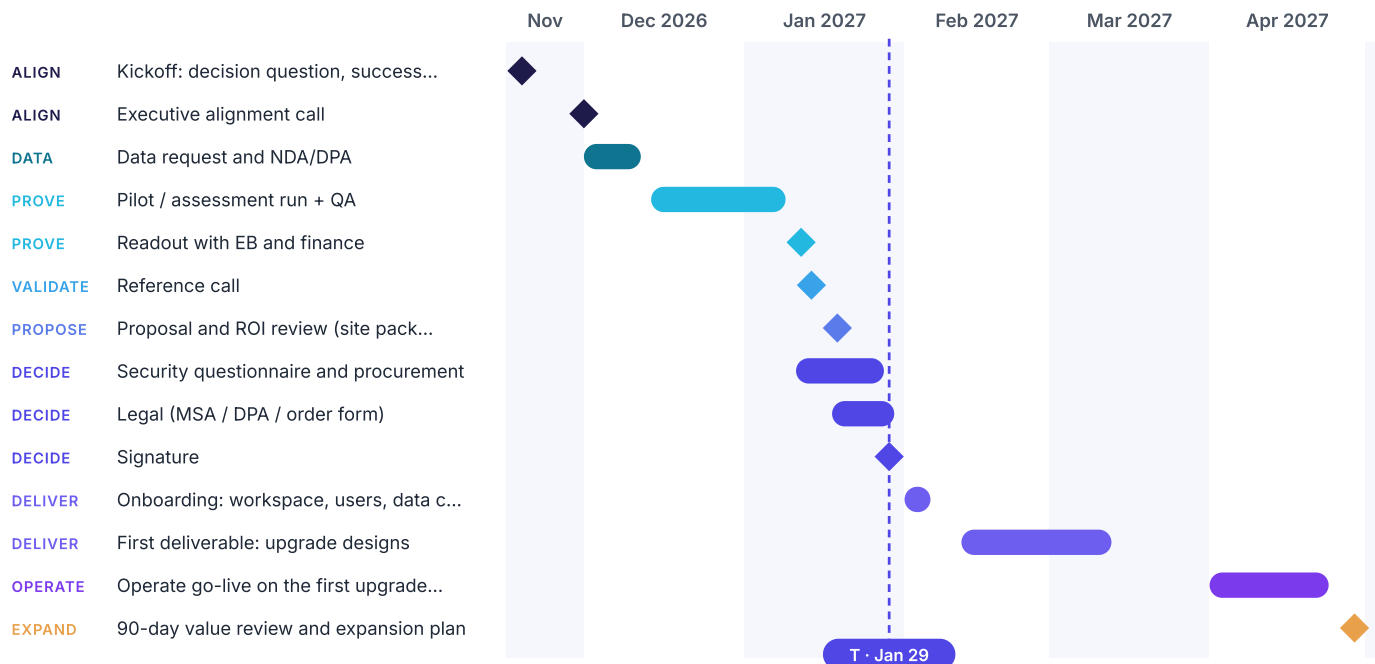


Figure 9.1 · Dennergo mutual action plan, Nov 2026 to Apr 2027. Diamonds are single-day milestones; the dashed line is target signature.

MAP hygiene rules

- ☐ The customer owns ≥50% of milestones
- ☐ Data milestones are explicit (the biggest stall risk)
- ☐ Every milestone has an owner and a date
- ☐ Reviewed weekly; changes logged
- ☐ Post-sale value milestones included

How the Dennergo MAP is run

One shared document owned jointly by Rachel Lindqvist and the AE. A 15-minute review every Thursday from Nov 19; slips are logged with a reason and a new date. Keystone Ridge Electric sees the partner rows. Status as of Oct 23, 2026: kickoff scheduled, all other milestones planned.

Focus & Grow

Tiering, buying triggers and land-and-expand motions.

10 Account Tiering

11 Buying Triggers & Events

12 Land & Expand Motions

SECTION 10 · SPEND TIME WHERE THE SCORE SAYS, NOT WHERE THE LOGO SAYS

10 Account Tiering

Score = Fit (0–40) + Potential (0–30) + Intent/Triggers (0–20) + Access (0–10). Tier 1 ≥75; Tier 2 55–74; Tier 3 35–54; Tier 4 <35 or self-serve. Weights are illustrative.

FIT · 0–40**Is this our kind of account?**

Segment, number of sites or depots, EV program stage, grid and tariff complexity, region priority.

POTENTIAL · 0–30**How big can it get?**

Sites × modules (Plan, Operate, Flex) whitespace.

INTENT · 0–20**Why would they move now?**

Active triggers from Section 11.

ACCESS · 0–10**Can we reach the decision?**

Champion, EB access, partner relationship.

Dennergo

CPO · 154 sites

Basalt Freightways

Fleet · 640 vehicles

Corbel Commercial REIT

Real estate · 48 properties

Lumenfield Energy Partners

Developer / financier

Quarry Creek Transit Authority

City / transit

Pinyon Ridge Electrical

Regional EPC

Harbor & Pine Hospitality

12 hotels

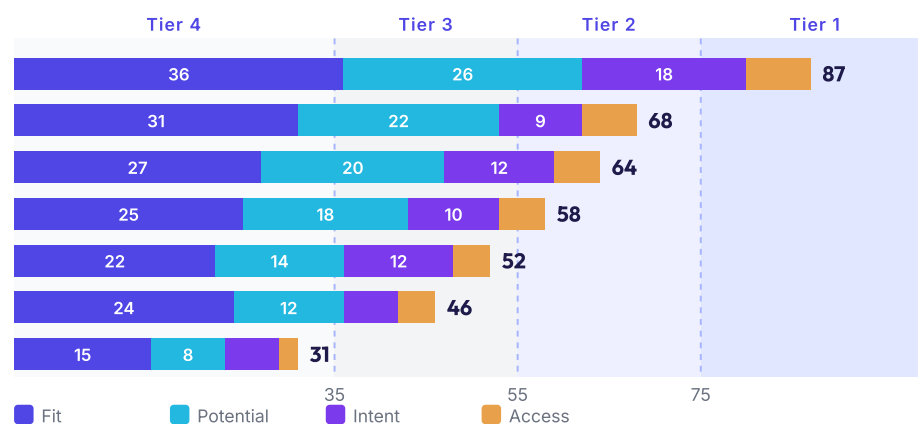


Figure 10.1 · Sample territory scored with the model (fictional accounts, illustrative scores).

Tier	Definition / criteria	Example profiles	Coverage model	Engagement cadence	Primary plays	Resource allocation
Tier 1 Strategic	Score ≥75; ≥50 sites or depots, or a strategic partner or logo; multi-module potential	Regional or national CPO; national EPC partner; large REIT; national convenience-retail chain; large logistics fleet	AE + CEO/CRO sponsor + analyst lead + advisor	Weekly AE; monthly exec; quarterly business review	Motions A, B, C, D	~50% of AE time; reserved analyst capacity
Tier 2 Growth	Score 55–74; 10–50 sites or an active project	Mid-size CPO; regional EPC; multi-site property manager; city or transit agency	AE + pooled analyst	Bi-weekly	Motions A, C, E	~30% of AE time
Tier 3 Develop	Score 35–54; early stage or small portfolio	Single-site developer; small fleet; consultancy	AE / inside follow-up; partner-led	Monthly or trigger-based	Portfolio Screen → site assessment; partner referral	~15% of AE time
Tier 4 Self-serve / Partner	Score <35	Small property owners; uploads below threshold	Product-led + partners	Automated nurture	Portfolio Screen; content	~5%

Tiering governance

- ☐ Re-score annually and on triggers
- ☐ Tier changes approved by the CRO
- ☐ Maximum Tier 1 accounts per AE ≈10 (illustrative)
- ☐ Tier drives exec coverage, MAP requirement and deal-review frequency

SECTION 11 · TWENTY SIGNALS THAT MAKE AN ACCOUNT WORTH A CALL THIS WEEK

11 Buying Triggers & Events

Sources: news, social and professional-network alerts, state and federal funding announcements, utility tariff filings, trade shows, Portfolio Screen uploads and partner intel. Urgency: **H** = act within 1 week; **M** = within 30 days; **L** = nurture. Items marked GK should be re-verified.

Live at Dennergo: four triggers at once

Network acquisition (22 Sagebrush sites, Aug 2026) · federal incentive loss on 14 planned builds · new CFO (Jul 2026) · utility rate case filed (Sep 2026). Four concurrent H/M triggers are why Dennergo scores 18/20 on Intent.

Trigger	Category	Signal source	Why it matters	Recommended play	Lead offer	Urgency
Portfolio Screen upload	Product signal	Platform notification	Hand-raiser with portfolio data	Readout within 2 days; propose site designs	Plan site pack	H
Underperforming or aging charging network	Operational	CPO disclosures; reliability studies; customer intel	Optimization beats expansion as networks age (S11)	Brownfield performance review	Site performance review	H
CPO network acquisition or consolidation	Strategic	Press releases	The new owner must evaluate acquired sites	Portfolio assessment of acquired sites	Brownfield review	H
Federal incentive loss (30C after Jun 30, 2026; 45W after Sep 30, 2025)	Policy	Tax guidance (S20)	Pipeline projects need re-modelling	"Re-model your pipeline" campaign	Plan re-evaluation	H
Federal or state charging-program round or award	Funding	State DOT plans; federal program reports (S20)	Funded projects need bankable designs fast	Engage awardees and their EPCs	Greenfield assessment	H
Utility tariff or demand-charge change	Energy	Utility rate cases	Economics shift; the storage case changes	Tariff-impact scenario	Plan + Operate	M
Grid-upgrade delay or interconnection queue	Grid	Customer discovery; utility notices	Needs alternatives (storage, microgrid, managed charging)	Grid-alternatives study	Microgrid workspace	H
New depot or fleet-electrification announcement	Fleet	Press, RFPs, sustainability reports	Needs a depot design and fleet plan	Fleet transition study	Fleet + Hub workspaces	H
Fleet vehicle replacement cycle	Fleet	Fleet data; lease expirations	A natural decision window	TCO comparison	Fleet workspace	M
REIT / CRE ESG commitment or tenant EV demand	Real estate	ESG reports; real-estate tech expos (S17)	NOI and tenant-retention play	Portfolio Screen	Real-estate offer	M
EV-ready building codes or parking mandates (state codes, GK)	Regulatory	Code updates	Compliance-driven installs need right-sizing	Code-compliance design	Plan	M
Retail or convenience chain EV program	Retail	Press; CPO partner news	Multi-site rapid evaluation	Multi-site greenfield pack	Portfolio Screen + Plan	H
EPC or installer wins a multi-site contract	Partner	Partner intel; press	The EPC needs fast, bankable designs	Partner trial / per-project	Partner offer	H
Storage or solar added at charging sites	Technology	Customer plans; vendor news	Operate / Flex opportunity	Sizing + Operate pilot	Operate	M

Trigger	Category	Signal source	Why it matters	Recommended play	Lead offer	Urgency
Demand-response or VPP program opening (FERC Order 2222 market rules, GK)	Market	Grid operator / utility announcements	New revenue streams	Flex eligibility assessment	Flex (validate)	M
Financing event (raise, tax equity, portfolio debt)	Financial	Press; financier intel	Lenders demand bankable models	Investor-grade report for lender diligence	Plan report	H
City climate plan or grant deadline	Public sector	Council agendas; grant calendars	Needs funding-ready financials	City planning study	Cities workflow	H
New executive (VP Network, Head of Fleet, CFO, Sustainability)	Organizational	Professional networks	New mandates; vendor review	POV meeting within 30 days	Account POV	M
Trade-show interaction	Marketing	Booth scans; meetings	Warm interest	48-hour follow-up; demo	Demo / Portfolio Screen	H
Charger hardware end-of-life or warranty expiry	Operational	Charger inventory	An upgrade decision is due	Upgrade design case	Brownfield review	M

SECTION 12 · SIX MOTIONS, EACH WITH A LAND OFFER AND THREE EXPAND STEPS

12 Land & Expand Motions

One row per motion. Write the chosen motion, with dates, into the account plan (Section 05).

Motion	Land offer	Entry persona	Expand step 1	Expand step 2	Expand step 3	Proof points / KPIs	Risks / watch-outs
A. Real estate: Screen → designs → operations	Free Portfolio Screen (≤15 sites)	Asset / Portfolio Manager; Capital Planning	Paid sites beyond 15 (\$45/site) + Plan designs for top-ranked sites	Portfolio subscription (multi-user) for capital planning	Operate on built sites; Flex or charging-as-a- service models	Uploads – paid %; sites designed; NOI uplift modelled	Owners delegating to vendors; slow capex decisions
B. EPC partner: per-project → platform → embedded offer	Per-project Plan analysis for live bids	EPC Principal; Proposal Lead	Platform subscription with seats for the EPC team	Co-delivered brownfield reviews for the EPC's CPO clients	Operate + O&M bundle with the EPC's maintenance services	Projects per quarter; partner- sourced ARR; bid win rate	EPC sees overlap with its engineering; end-client access
C. CPO brownfield: review → upgrades → Operate → Flex	Site performance review (10–40 sites)	VP Network / Head of Ops	Upgrade designs (charger sizing, storage, ops changes) for top sites	Operate across upgraded hubs	Flex aggregation of storage and flexible load	Sites reviewed; % uplift realized vs the 18–24% claim; \$ demand charges saved	Data access; capex constraints delaying upgrades
D. Fleet: study → depot design → operations → network	Fleet transition study (1 depot or segment)	Head of Fleet; Sustainability; CFO	Depot charging + microgrid design	Operate at the depot (cost minimization, scheduling)	Roll out to more depots and regions; partner bundles	Vehicles planned; depots designed; TCO savings	45W loss changing economics; vehicle delivery delays
E. Cities: plan → platform → reporting	Program-level planning study for grant applications	Sustainability Director; Transit / Fleet lead	Multi-department platform access	Ongoing emissions tracking and progress reporting	Public charging network design and operations	Grants won; emissions tracked; departments onboarded	Procurement cycles; political change
F. Developers & financiers: screening → pipeline → portfolio ops	Investor-grade reports for deal screening	Investment Director; Energy Developer	Pipeline subscription (many sites and scenarios)	Lender-standard reporting across the portfolio	Operate / Flex for owned assets	Deals screened; time to close	Lender acceptance of reports



Illustrative 3-year account value ≈ \$540K (Y1 \$156K · Y2 \$177K · Y3 \$207K)

Figure 12.1 · Motion C at Dennergo: an illustrative three-year expansion path (first-year value per step, \$K).

PART VI

Field Kit

Sequences, talk tracks and objection handling.

13 Field Kit: Sequences & Talk Tracks

SECTION 13 · WHAT TO SAY, IN WHAT ORDER, TO WHOM

13 Field Kit: Sequences & Talk Tracks

The process is only as good as the conversations inside it. This kit gives Garallen Company sellers a way to read an account's urgency, a 30-minute first-call structure, a trigger-led outreach sequence written for Dennergo, persona talk tracks and objection responses. Adapt the words; keep the structure.

13.1 Read the room: account phase



Figure 13.1 · Accounts can enter at any phase and move at any time. The higher the phase, the higher the urgency.

13.2 Anatomy of a 30-minute first call

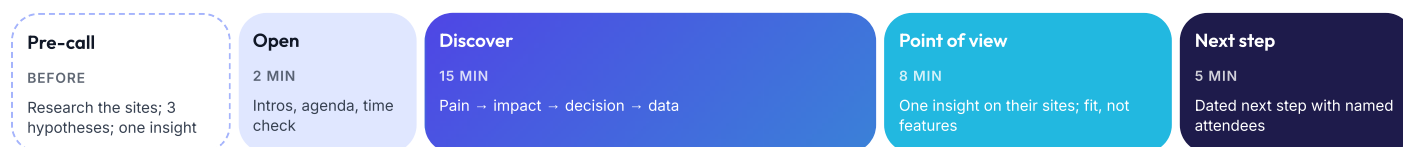
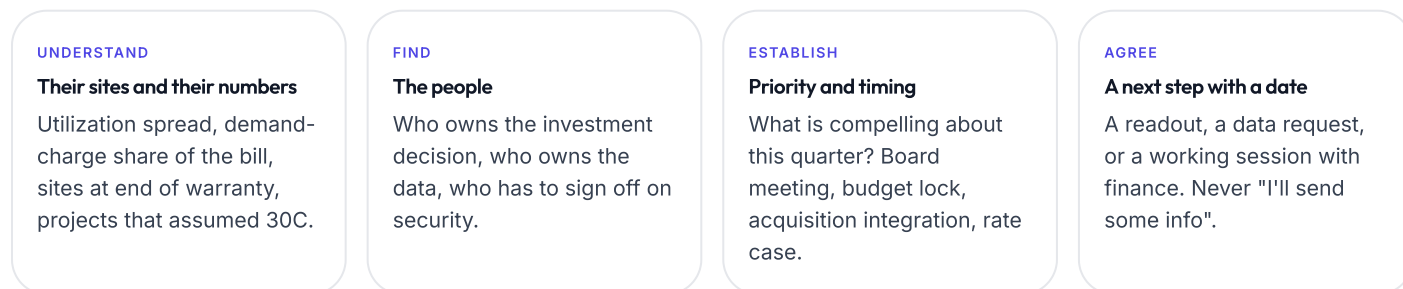


Figure 13.2 · First-call structure. Talk less than 40% of the time; leave with a dated next step.



13.3 Trigger-led sequence: VP Network Development, Dennergo

Trigger: Dennergo's acquisition of the 22-site Sagebrush network plus the loss of 30C eligibility on planned builds. Seven touches over 18 business days across email, phone, social and an executive introduction. Personalize the bracketed fields; never send a touch without a reason to exist.



Day 1

EMAIL

Subject: 22 new sites, 14 re-priced builds

Daniel, congratulations on closing the Sagebrush acquisition. Two things usually land on a network lead's desk right after a deal like that: deciding which acquired sites to upgrade, keep or retire, and re-checking planned builds that assumed the 30C credit. We help CPOs answer both with site-level models their CFO will accept, typically within a business day of getting the data. Worth 20 minutes to compare notes on how you're sequencing the integration?

Day 2

SOCIAL

Connect request

Daniel, I follow Dennergo's Mountain West build-out and work with operators on site economics after the federal credit changes. Would be glad to connect.

Day 4

CALL + VOICEMAIL

Daniel, it's [Name] at Garallen Company. I'm calling about the Sagebrush sites. Most operators we work with find a handful of acquired sites carry most of the demand-charge risk. I have a one-page view on how to find them fast. I'll send it over; my number is [phone].

Day 7

EMAIL

Subject: The 30C math on your 2H builds

Daniel, a quick follow-up with a specific idea. Projects placed in service after June 30 no longer get 30C, so builds approved last year at an 11–12% hurdle can quietly fall under it. A re-model usually changes one of three things: site order, charger count or storage size. Attached is a one-page example (illustrative data) showing what changes. Open to a 20-minute walkthrough?

Day 10

EXEC INTRO

From our CEO

Lena Marchetti (CEO) writes to Teresa Valdez: a short note on Mountain West network integration, one insight from similar operators, and an offer of a 20-minute executive exchange. Copy Daniel.

Day 14

CALL

Reference the CEO note. Ask one question: "Of the 22 Sagebrush sites, how many do you already know you'd keep at today's tariffs?" If he engages, book the readout; if not, ask who owns the integration model.

Day 18

EMAIL

Subject: Closing the loop

Daniel, I'll stop here so I don't clutter your inbox. If it's useful later, you can upload up to 15 site addresses to our free Portfolio Screen and get a ranked view in a day, no call needed. If integration planning picks up after the budget lock, I'd be glad to help.

13.4 Persona talk tracks

CFO

Cares about: Defensible returns and fewer capital surprises

"Every site in your plan was approved under assumptions that changed this year. We re-run each one with your hurdle rate, current tariffs and no 30C, and an analyst checks the result before you see it. You get a model your board and lender can audit, not a vendor's estimate."

Then ask: What hurdle rate does the board apply, and which projects are closest to it?

DIRECTOR, SITE OPERATIONS

Cares about: Fewer failing sites and demand-charge surprises

"Most networks have a short list of sites that cause most of the pain. We rank every site by upside and tell you what to change, whether that's chargers, storage, pricing or hours, before your crews roll a truck."

Then ask: Which five sites would you fix first if budget weren't the question?

ENERGY & GRID MANAGER

Cares about: Models they can trust and defend

"The engine is deterministic: same inputs, same answer, every time, with every assumption logged. Where you don't have interval data yet, we start from documented defaults and you approve them."

Then ask: Which inputs do you trust today, and which are guesses?

HEAD OF IT & SECURITY

Cares about: Low-risk data handling

"We need tariffs, interval data and charger inventory, not customer payment data. Access is role-based, onboarding data can be anonymized, and our security pack answers the standard questionnaire. I'll only claim the certifications our Security lead has confirmed in writing."

Then ask: What does your vendor review require, and how long does it usually take?

13.5 Objection handling

Objection	Response	Then ask
"Our spreadsheet / engineering firm handles this."	"Keep them. Most of our customers do. We make each study take a day instead of six weeks, so you can re-check every site when a tariff or policy changes instead of once per project."	"When did you last re-run the whole portfolio, and what did it cost?"
"The charger vendor designs it for free."	"Their design answers 'which charger'. It doesn't answer 'is this site worth building, and how big should the battery be'. We're vendor-neutral, so the answer isn't tied to a product."	"Who on your team checks the vendor's assumptions today?"
"No budget until next fiscal year."	"Understood. A paid review is usually less than one avoided overbuild, and the fee can be credited to a later order. Can we size the decision now so it's in the FY27 plan before budgets lock?"	"What has to be true for this to make the December budget?"
"You're a small company. What if you're not around?"	"Fair question. Reports and models are exportable and auditable, so the decision stands on its own. We'll walk your team through our security pack and give you references from operators your size."	"What would you need to see to be comfortable?"
"Just send me some information."	"Happy to. So it's useful and not generic: which decision is closest, the acquired sites or the planned builds?"	"Can I send it with 15 minutes on Thursday to walk through it?"

APPENDIX

Appendix

Adaptation notes and the evidence register.

A Accuracy & Adaptation Notes

B Evidence Register

SECTION A · WHAT WAS ADAPTED, WHAT WAS ASSUMED, WHO VALIDATES

A Accuracy & Adaptation Notes

This playbook adapts a reference enterprise-playbook structure (originally written for a hardware-plus-cloud field-sales motion) to Garallen Company's SaaS-plus-analyst model. Prepared from public sources as of Oct 16, 2026 for Garallen Company's revenue team; not yet reviewed by Garallen Company leadership. Items marked Assumption or Inferred need validation.

Item	Reference template element	Garallen Company adaptation	Basis	Validation owner	Open question
Stage sequence	8 stages (Prep → Discovery → Demo → Trial → Best Practices → Site Walk → Pricing → Close)	Same sequence; Site Walk = Site Data Intake & Assessment; Best Practices = five-discipline value validation	Adaptation	CRO	Do CRM stages already exist under different names?
Demo	Hardware and cloud platform demo	Scenario demo on the customer's site or fleet + sample investor-grade report	Sourced capabilities (S1, S3)	CRO / Product	Is there a standard demo tenant and script?
Trial	Free hardware trials	Portfolio Screen free tier (≤15 sites), paid assessments, Operate pilot	Free tier Sourced (S4); paid-pilot policy Assumption	CRO / COO	Official pilot pricing and credit policy
Qualification	MEDDPICC	MEDDPICC-D (Data readiness)	Adaptation	CRO	Preferred methodology?
Channel	Value-added resellers	EPCs, consultancies, hardware and EV-conversion partners, CPO/site-host consortia	Sourced partners (S11–S13, S17); program terms Assumption	CRO	Formal partner program and margins?
Product naming	Hardware product lines	Garallen Plan / Operate / Flex; "SiteLens" (Apr 2026 release)	Sourced, inconsistent	Product / Marketing	Canonical product names and packaging
Operate & Flex maturity	—	Positioned as expand modules with "validate GA" flags	On the website; no launch release found	R&D lead / CEO	GA status, reference deployments, supported markets and protocols
Pricing	Hardware list prices	Only public: \$45 per additional site (Portfolio Screen); all else placeholders	Sourced (S4) / Assumption	CRO / COO	Price book, ACV benchmarks, discount guardrails
Thresholds & targets	Field activity metrics	Illustrative (\$25K deal review, activity counts, tier scores)	Assumption	CRO	Calibrate to quota and analyst capacity
Tools	Internal sales tools	CRM (assumed), social-selling tool (assumed), scheduling link (sourced), e-signature (assumed)	Mostly Assumption	COO / RevOps	Actual CRM and sales stack
Security claims	—	Use only S8 statements; ISO references need confirmation	Sourced, unverified	COO	Which certifications are formally held?
Funding & headcount	—	Ranges from third-party databases	Sourced, conflicting	CEO / Finance	Approved company facts for sales decks
Advisor bio	—	Utility advisor: website says former distribution-planning executive; a professional-network profile lists a different prior role	Sourced, partly inconsistent	CRO	Approved advisor bios
Competitors	Hardware competitors	Telematics-led tools, fleet-planning startups, microgrid design software, charging/DERMS/VPP vendors, consultants	Sourced (S19) + GK	CRO	Official battlecards and win/loss data

Item	Reference template element	Garallen Company adaptation	Basis	Validation owner	Open question
Policy facts	—	30C / 45W / federal program per S20; state codes, FERC Order 2222 and clean-fuel credits = GK	Mixed	CRO / Advisors	Re-verify before customer use
Worked ROI example	—	Illustrative Dennergo case (Section 07)	Assumption	Analyst lead	Replace with an anonymized real customer result

Open items for Garallen Company leadership

- ☐ Canonical product names and packaging (Plan vs SiteLens; Operate and Flex availability)
- ☐ Price book, pilot policy and partner terms
- ☐ CRM and sales tools in use; stage definitions
- ☐ Reference customers and case-study permissions (EPC brownfield, retail rollout, earlier pilots)
- ☐ Security certifications and the standard security pack
- ☐ Analyst QA capacity model and SLA commitments
- ☐ Target regions and segments for FY2027 territories

SECTION B · EVERY [S#] TAG, IN ONE PLACE

B Evidence Register

In a delivered playbook, every row links to the exact page or document. In this sample the sources are fictional, so links are omitted.

Tag	Source
S1	Garallen Company homepage: platform, modules (Plan, Operate, Flex), segments, advantages, offices
S2	Garallen Company About page: positioning ("embedded project partner"), leadership and industry advisors
S3	Garallen Plan module page: features, integrations, standards, workflow, one-business-day QA'd report
S4	Garallen Company for Real Estate: Portfolio Screen, pricing (\$45 per additional site, 15-site free tier), personas
S5	Garallen Company Applications page: value by persona (finance, fleet, charging hub, property)
S6	Garallen Company sector pages: Logistics and Cities (Project / Fleet / Hub / Microgrid workspaces)
S7	Garallen Company blog: "Why charging projects underperform" (five disciplines), May 2025, + Insights index
S8	Garallen Company Security & Data Privacy page (multi-tenant, anonymization, public-cloud hosting)
S9	Garallen Company Careers page (engineering roles only)
S10	Garallen Company Events: GA launch (Mar 2024), trade-media webinar (Oct 2024), 2025 roadshow (10 US cities)
S11	Press release, Apr 2026: EPC partner selects Garallen Company to re-evaluate 31 charging sites (CO/UT/AZ); "SiteLens"
S12	Press release and trade article, 2025: Garallen Company's role in a 24-store convenience-retail EV rollout
S13	Consultancy partnership announcement, Jun 2024
S14	Press release, Mar 2024: platform upgrades (sensitivity analysis, carbon calculations)
S15	Startup-ecosystem company profile (earlier pilots; GA Q1 2024)
S16	Funding databases (figures conflict)
S17	Garallen Company professional-network page; expo booth post (Jun 2026); partner and event posts (2025)
S18	Contact-data and professional-network search snippets: headcount ~22, ~2 sales staff
S19	Competitor product pages: telematics suitability, fleet-planning and assessment tools
S20	Federal tax-credit guidance (30C, 45W) and a congressional research report on the federal charging program
S21	Garallen Company white paper (fleet conversion and energy management)
GK	General industry knowledge not re-verified in this pass (microgrid tools, VPP vendors, make-ready programs, FERC Order 2222, clean-fuel credits, state codes, MEDDPICC)



CASHEWLEADS ENTERPRISE PLAYBOOK

Want a playbook like this, built for your team?

Every Cashewleads playbook is custom-built around your own company: your ICP, buying committee, stages, qualification, business case, mutual action plan and outreach.

What you get

- **Your ideal customer profile**
Who is a great fit, how to tier accounts and the segments to go after first.
- **Messaging for your buyers**
Positioning, value pillars, outbound messaging and cadence built around your personas.
- **Qualification and sales process**
Stage criteria, a qualification framework and a discovery guide your team can use.
- **Business case and mutual action plan**
An ROI structure with a worked example and a shared plan to signature.
- **Objections and competitive positioning**
Responses built only from the claims and proof you give us.
- **Gaps flagged, never guessed**
Anything we cannot know from your answers is marked for input, not invented.

How it works

- 1 **Fill in the intake**
A guided questionnaire about your company, buyers, sales motion and deal model.
- 2 **We build it**
The Cashewleads team builds your playbook by hand from your answers, and reviews it.
- 3 **Delivered to you**
Your finished playbook arrives by email after review.

\$499 one-time delivered after review

Or get the Playbook + 4 Jade Bots for \$799

cashewleads.com

This is a sample Cashewleads Enterprise Playbook. Garallen Company, Dennergo, every other company, every person and every figure in it are fictional and illustrative. They are modelled on a real engagement to show the depth and format of the deliverable, not to describe any real business. For a real client playbook we never invent customers, statistics or quotes.