

DealSpace

Another deal review wasted?

Dooly's DealSpace surfaces the critical deal information you care about *before* your 1-1's. Stop playing catch up and start using your time to strategize on how to advance deals to closed won.

EXPLORE DEALSPACE

Deal Summary

...

Company overview:

Cardinal is a leading communications company founded in 1998. They're investing in tightening up their tech stack this year.

Champion:

Julia Kuhlman, the VP of sales. Very keen to work with us, but facing some internal pushback.

Pain points:

• Struggling with communication breakdown internally.

• Leading to very inconsistent process because team members don't know where to go to find what they need.

• They don't have the capacity to oversee all steps of the process so they need help automating as much of it as possible.

Risks & Roadblocks

...

● Champion tells us they're facing budget constraints due to economic conditions, so the org is hesitant right now to commit unless we can prove ourselves.

● Seems to be some delays in the decision-making process - we don't know why just yet.

● They're looking at several competitors, we've lost deals to a couple in the past.

+ Add item

Action plan

...

Open tasks

3

Next meeting

Nov 28

Next step

✓

Open tasks

☐ Prep 1-pager for Cardinal deal

Assigned to Due Nov 24

☐ Prep for disco call

Assigned to Due Nov 26

☐ Follow up with champion after disco call

Assigned to Due Nov 29

Next meeting

Brightshare <-> Cardinal Disco Call

On Nov 28, 2023 Attendees

Key players

...

Identified

4

Incomplete

—

Roles

3

JK

Julia Kuhlman

VP Sales

julia@cardinalcom...

Decision Maker

JZ

Jan Zemlak

Account Executive

jan@cardinalcom...

Evaluator

GO

Guillermo O'Hara

Account Executive

guillermo@cardin...

Influencer

PL

Paula Lehner

Director, RevOps

paula@cardinalco...

Economic Buyer

+ Add key player

Powering high-efficiency and process-obsessed sales and CS teams worldwide.





Ditch the spreadsheet.

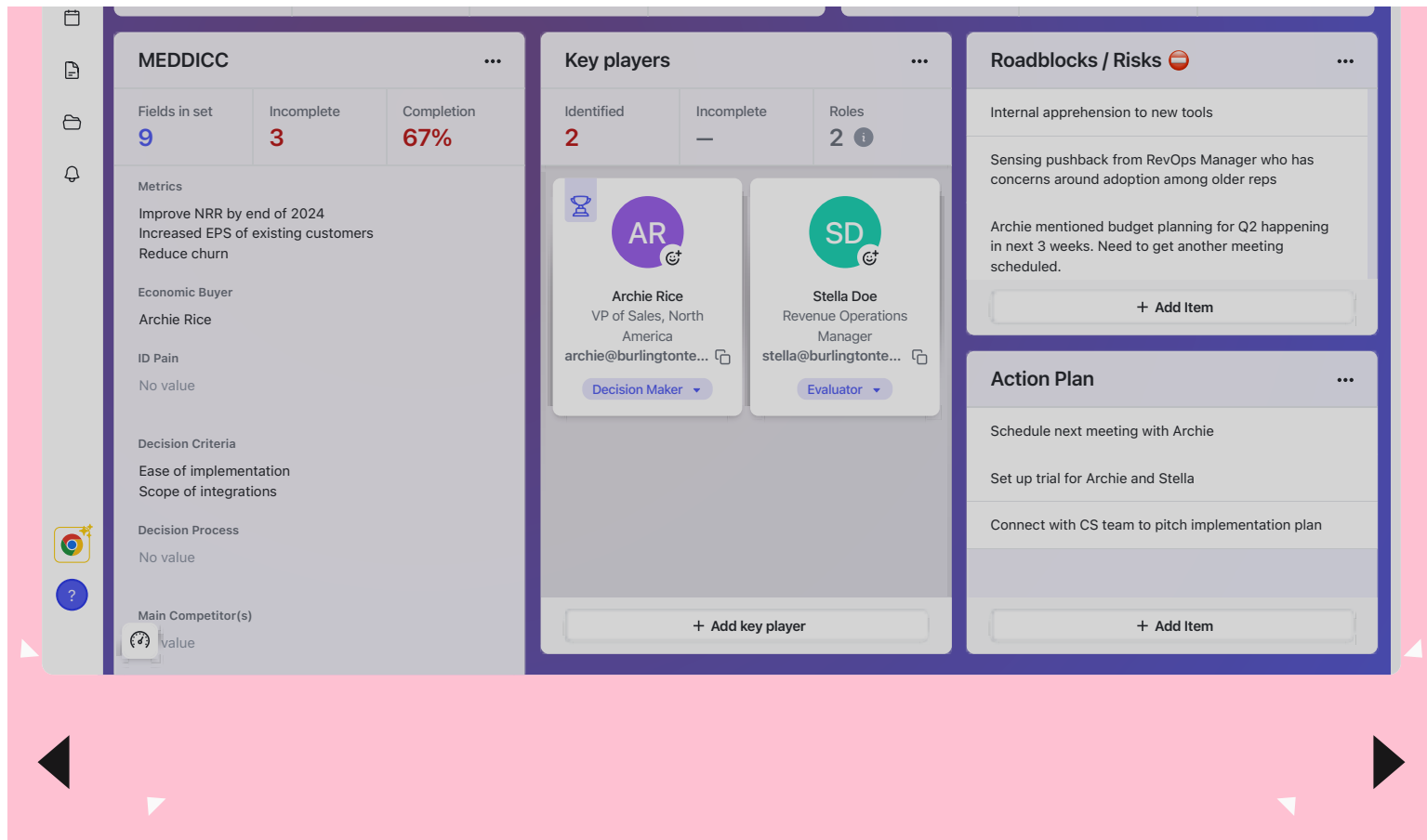
Cobbling together data to track your team’s deals isn’t working.

With DealSpace, easily see deal data in a customizable deal-by-deal view that summarizes exactly what you want to know about your rep’s pipeline.

Check out an interactive tour of DealSpace below!

 [VIEW FULL SCREEN](#)

		Burlington Textiles Corp of America		1 of 2		MEDDICC Deal View			
Burlington Textiles Corp - 2024									
Amount	Stage	Close date	Forecast Category	Meetings to date	Deal Vitals	Deal Age			
\$47,000	Id. Decision ...	Mar 28	Pipeline	0	0/0	9 days			
↑ from \$10,000	Updated 3 days ago								



Up to speed in seconds.

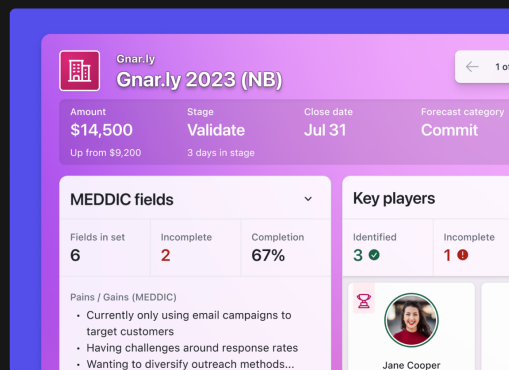
Quickly learn how a deal has progressed, or hasn't, with Main Metrics that include deal size, stage, age, and close date.

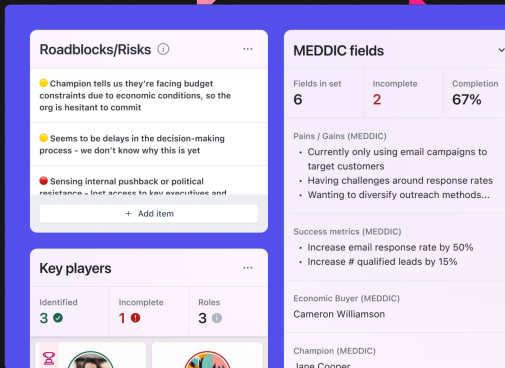
"DealSpace makes me feel like I have a better working knowledge on deals my team is managing."



Kate Jane Bailey
Enterprise Sales Manager, Figma

Figma



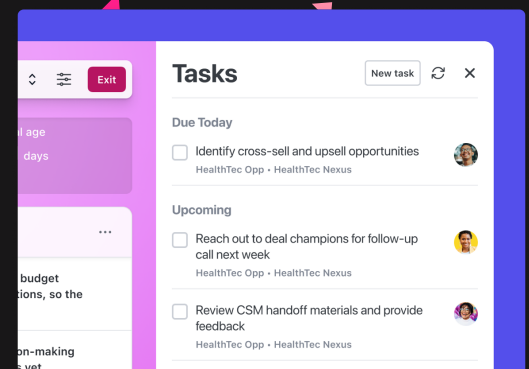


Run deal reviews the way you want to.

Customize your DealSpace to work the way you do. Bring in critical Salesforce data, update fields on the fly, and create custom cards to document risks, roadblocks, plans of action, and much more.

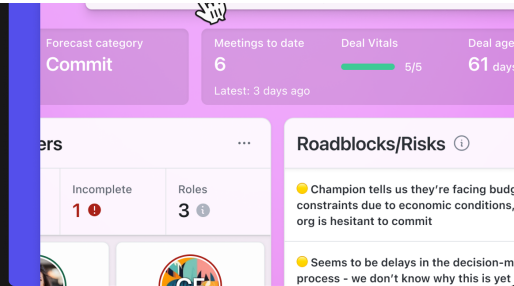
Keep your reps aligned.

Hold your team accountable with tasks and comments. Use private manager notes to keep your insights top of mind.



Stay focused.

Focus your 1-1 conversations on the points that matter by



Forecast category
Commit

Meetings to date
6

Deal Vitals
5/5

Deal age
61 days

Latest: 3 days ago

ers

Incomplete
1

Roles
3


Roadblocks/Risks

Champion tells us they're facing budget constraints due to economic conditions, org is hesitant to commit


Seems to be delays in the decision-making process - we don't know why this is yet

easily flipping through priority deals and discussing them one at a time.

“This tool is exclusively what I use in my one-on-one sessions with my team and individually to review.”



Ben Pearson
Head of Sales & GTM, Navattic



Leader

Sales Enablement & Sales Performance Management.

★★★★★

Over 685 five-star reviews!



Unlock the power of Dooly's connected workspace for your sales processes today.

Get started now

Why wait? Dooly provides unlimited access to our platform features and capabilities — for free. Start exploring today!

[CREATE A FREE ACCOUNT](#)

SOLUTIONS

Sales Cycle Management
Post Sales Customer Management
Deal Reviews
Process Adoption
Team Handoffs

ROLES

Account Executive
Sales Leader
Sales Enablement
RevOps
Customer Success

PRODUCT

Product Overview
Notes
Pipeline
DealSpace
AccountSpace
Templates
Playbooks
Deal & Account Vitals
Chrome Extension
Integrations
Security
Subprocessors

RESOURCES

Blog
Customer Stories
Help Centre
Fire Talks
Webinars
Podcasts

COMPANY

Why Dooly
Careers
Customer Love

REPORTS

9 X-Factors
Sales Happiness Index
State of Sales Productivity
Sales Process Report
State of Sales Leadership
Finish the Quarter Strong

GUIDES

Salesforce Notes
Sales Pipeline
Sales Management Software
Sales Forecast
Log a Call in Salesforce
Find Hot Opportunities
Close the Quota Gap
Sales Time Wasters
Why Reps Quit