THE RESULT

"Half my income"? Her FY27 target pay is $180K, with a floor for two quarters. But she's right about the quota and $25M of pipeline that closes after March 31.

A VP Sales at a 22,000-person steel company prepares to meet his top regional VP after a reorganisation moves half her bookings, with any AI chat his company allows.

THE RESULT Marcus's private prep for Wednesday, December 2. Fictional company.

KESSROW STEEL · SALES · NORTH AMERICA

Conversation plan: Dana Okoro, Wednesday, December 2

Private prep: Marcus Webb
Monday, November 30

WHAT THE DOCUMENTS SHOW

Bookings moving	Deal credit	FY27 quota	Pay protection
50%	**$15M of $40M**	**$95M**	**Applies**
$88M of $176M; 38% without the 4 national-desk accounts	$25M closes after March 31	8% above her remaining accounts' FY26 bookings	At least 75% of target, first two quarters; comp confirms the amount

THE CONVERSATION

SHE'S RIGHT
The quota and the deals after March 31
$95M is above the $88M her remaining accounts booked in FY26, and she keeps no credit for $25M of pipeline closing after March 31. · Inputs 1, 4

ASK ANDREA FIRST
What was said last spring, how the quota was set, credit for named deals
The promise is only in Dana's email. I don't confirm or dispute it until Andrea answers. · Inputs 1, 2

MY ASK
Send me your list of deals in flight in the 12 accounts by Thursday, December 3
So I can take named-deal credit to Andrea. I bring Andrea's answers on Friday, December 4, if she confirms she can answer by then. · Input 4

CAUGHT ON REVIEW

1. "Half my income": her FY27 target variable is **$180K**, and pay protection applies
2. 4 of the 12 accounts (**$21M**) were sold by the national accounts desk
3. **$25M** of pipeline closes after March 31, with no credit to her

UC-002 · SC-06 · REV A	
FOR **VP Sales, North America**	SECTOR **Steel**
COMPANY **22,000 people · 12 mills · US, Canada**	TASK **Prepare to tell a top regional VP that half her bookings move to a new team**
WRITTEN FOR **ChatGPT · Claude · Gemini · Copilot**	
AI TEST **Claude, Nov 15, 2026 · 7 of 7 found**	

STEP 0 · THE MESS

What landed on Marcus's desk

A short memo from the CRO, a sharp email from his best regional VP, an extract of the comp plan and four lines from sales operations. The email mixes facts, fears and a promise nobody else has written down.

MEMO · CRO [1]

Strategic Accounts team

"Great Lakes moves 12 accounts, $88M of its $176M FY26 bookings."

1 **The change.**

EMAIL · REGIONAL VP [2]

Pushback

"You're taking half my territory and half my income."

2 **Claims and fears.**

COMP PLAN [3]

Extract

"If a territory change removes more than 25% … paid at least 75% of target."

3 **The rules.**

SALES OPS [4]

The 12 accounts

4 of them ($21M) have been sold and serviced by the national accounts desk.

4 **Who built what?**

YOU'RE NOT ALONE

73%

of chief sales officers in a Gartner survey said they were prioritising growth from existing customers, the kind of shift that moves large accounts into dedicated teams.

Gartner, survey of 243 CSOs and senior sales leaders, October to November 2024, published May 2025. Source

STEPS 1–3 · HOW IT WORKS

Three steps, one chat

Here the AI helps you prepare to face someone who is partly right. The prompt tells it to separate the documents from the fears.

1 Open a new chat

Use the AI tool your company approves: ChatGPT, Claude, Gemini or Copilot.

2 Paste the prompt and the inputs

Copy the prompt and the four fictional inputs from the appendix into one message.

3 Check every promise the AI writes for you

Read the lines it suggests you say, and strike any figure or promise you can't stand behind. Then decide what you'll ask of her.

THE PROMPT, PART BY PART

COPY-READY VERSION IN THE APPENDIX

I'm VP Sales for North America at a steel company. From January 1 a new Strategic Accounts team takes over our largest customers, and one of my regional VPs, our top performer last year, loses 12 accounts. She has pushed back hard by email. I meet her on Wednesday, December 2. Today is Monday, November 30. Below are the CRO's memo, her email, the comp plan extract and the sales operations data.

1 Who you are, what changed, who you're meeting, when, and today's date.

Please help me prepare:

1. **Each claim in her email**: what the documents show, what they don't, and what I can't know yet.
2. **What she's right about.**
3. **What I can offer**, what I need to ask the CRO for before Wednesday, and what I can't offer.
4. **One clear ask** for the end of the meeting.
5. **My opening two or three sentences**, and the questions she's likely to ask, with honest answers.

2 Each claim checked, what she's right about, what you can and can't offer, one clear ask, and opening lines with honest answers.

Separate what the documents show from what she fears, and don't guess at her motives. Check the arithmetic. Don't add facts that aren't in the inputs; if you assume something, say so.

3 The heavy lifting: separate what the documents show from what she fears, and don't guess at her motives. It found all seven planted problems.

WHERE TO PASTE

Every tool has one message box. Paste the prompt, add a blank line, paste the inputs, send.

SAFE TO TRY

Practise with the fictional inputs first. Real pay, quota and personal details are confidential: use only your company's approved tool, and leave out anything personal you don't need.

THE AI'S FIRST ANSWER

What Claude actually wrote

Exactly as it came back, not edited. Read it the way Marcus did: check each point against the source it cites.

UNEDITED Claude · fresh session, no other context · Nov 15, 2026 · one run

Preparing for Wednesday, December 2 with Dana Okoro

First, the arithmetic (from inputs [1], [3] and [4])

Figure	Calculation	Result
Share of Great Lakes FY26 bookings moving	$88M / $176M	50.0%
Moving bookings in the 4 national-desk accounts	$21M / $176M	11.9% of region; 23.9% of the $88M
Moving bookings in the other 8 accounts	$88M − $21M = $67M; $67M / $176M	38.1%
FY26 bookings left in Great Lakes	$176M − $88M	$88M
FY26 attainment	$176M / $150M	117.3%
Proposed FY27 quota compared with the bookings that stay	$95M / $88M	108.0% (she needs $7M, or 8.0%, more than the remaining accounts booked in FY26) found
Quota cut compared with the bookings cut	$150M → $95M is −36.7%; bookings base −50%	The quota falls by less than the territory
Open pipeline split	$15M + $25M = $40M	62.5% of the pipeline ($25M) is expected to close after March 31, so she gets no credit for it
If the $15M credit counts toward FY27 (an assumption, see below)	$88M + $15M = $103M; $103M / $95M	108.4%, if the remaining accounts repeat FY26 and the $15M closes as expected
Illustration only: FY26 quota-to-bookings ratio applied to the remaining base	$150M / $176M = 85.2%; 85.2% × $88M	about $75M (not a proposal, just a comparison point)
Protection floor	75% × $180K	$135K a year. If it is paid as a share of two quarters' target (assuming half the year's target is $90K): 75% × $90K = $67.5K found

Every figure checks out internally: $15M + $25M = $40M, and $88M is exactly half of $176M.

1. Each claim in her email

"You're taking half my territory" found

- **What the documents show:** 12 accounts carrying $88M of $176M FY26 bookings, which is exactly 50% by bookings.
- **What they don't show:** how many accounts Great Lakes has in total, so "half" by account count is unknown. Future potential by account is also unknown.
- **Nuance:** $21M of the $88M is in 4 accounts the national accounts desk has sold and serviced since FY24. The territory she works herself loses $67M (38.1%).

"...and half my income" found

- **What the documents show:** FY27 target variable pay is $180K whatever the territory. The quota drops to $95M. The protection clause is triggered, because 50% (or 38% if you exclude the national-desk accounts) is above 25%, so she is guaranteed at least 75% of target for the first two quarters. She keeps credit for the $15M expected to close by March 31.
- **What they don't show:** her base salary or total income, the FY26 target variable pay (so $214K can't be compared with $180K like for like), the payout curve above and below quota, and any projection that her pay halves. Nothing in the inputs supports "half my income" as stated.
- **The real concern underneath:** her quota is now 108% of what her remaining accounts booked in FY26, while last year's quota was 85% of what she booked. Her chance of beating quota looks lower, but the inputs don't show what that does to her pay.
- **What I can't know yet:** whether the $15M credit counts toward the $95M, how the protection payment is calculated ($135K or $67.5K, see above), and when the fiscal year starts. **Assumption:** FY27 starts January 1. The inputs don't say so.

"I built every one of those accounts over eight years" found

- **What the documents show:** 4 of the 12 ($21M) have been sold and serviced by the national accounts desk since FY24, with Great Lakes credited.

- **What they don't show:** who built those 4 before FY24 (she may have), and the history of the other 8 accounts. There is nothing in the inputs about eight years.
- **Takeaway:** the claim is not supported for 4 of the 12 since FY24. For the rest, it is unknown, so don't argue it.

"When Andrea moved the Ohio accounts last spring, she told me Great Lakes would stay intact through FY27" `found`

- **What the documents show:** nothing. None of the four inputs mentions the Ohio move or any commitment.
- **What I can't know yet:** whether this was said, in what words, and whether it was written down. Only Andrea can answer. Don't confirm it or dispute it on Wednesday.
- **Also unknown:** whether the Ohio move changed FY26 bookings or quota.

"I'll need to think about my options" `found`

- This is not a factual claim, so there is nothing to check. Take it as a retention risk to raise with Andrea, and don't read a motive into it.

2. What she's right about

- Half of her FY26 bookings ($88M of $176M) is moving.
- She was the top performer, at 117.3% of quota.
- The $95M quota is higher than what her remaining accounts booked in FY26 ($88M). The quota fell 36.7% while her bookings base fell 50%, so it's fair for her to ask how the number was set.
- She loses credit for $25M of open pipeline in those accounts that is expected to close after March 31. `found`
- The territory change is big enough to trigger the protection clause by any measure.
- The memo went out November 23 for a January 1 change, so she has had little notice. The inputs don't show whether she was consulted before the memo.

3. What I can offer, what to ask Andrea, and what I can't offer

What I can offer (it's already in the documents, or it's my own time):

- A transparent walk-through of the numbers above.
- Confirmation that she keeps credit for deals in the 12 accounts that close by March 31 (memo), and my support in closing the $15M.
- Confirmation that the protection clause applies to her situation. Give the exact amount only once comp or Andrea confirms it.
- Written answers from Andrea on the open points by a date I name, and a follow-up meeting.
- Her own list of the accounts and deals she believes she built, taken to Andrea as she wrote it.

What to ask Andrea before Wednesday:

1. Did you tell Dana last spring that Great Lakes would stay intact through FY27? If so, in what words, and is it written anywhere?
2. How was the $95M quota set? Does it include the $15M of credited pipeline? Does the baseline count the 4 national-desk accounts? Is it open to review? For comparison, last year's ratio applied to the remaining base gives about $75M. `B: no number of our own`
3. The protection clause: confirm it applies, the dollar amount ($135K or $67.5K), which quarters it covers, and the fiscal-year dates.
4. The $25M closing after March 31: is any credit split or longer credit window possible?
5. Is the January 1 move final? What, if anything, is negotiable?
6. Dana has raised her options in writing. What latitude do I have, and do you want to be involved?

What I can't offer:

- Reversing or delaying the move.
- A different quota, extended credit or a guaranteed pay figure before Andrea agrees to it.
- Any statement about what Andrea did or didn't promise last spring.
- Credit for the $25M expected after March 31.

4. One clear ask for the end of the meeting

"Give me until Friday, December 4 to bring you Andrea's written answers on the quota, the protection payment and what was said last spring, and meet me again that day to go through them." `C: ask her for something`

Before you say the date, confirm with Andrea that she can answer by then. The inputs don't show that she can.

5. Your opening, and the questions she's likely to ask

Opening: "Dana, thank you for putting it in writing. You were our top region last year, and this change takes half of your FY26 bookings, so you're right to push. I want to go through what the documents actually say, tell you plainly what I don't know yet, and agree on how we get those answers."

Likely questions, with honest answers:

- **"Did Andrea promise me the territory stayed intact or not?"** "I don't know. It's not in anything I have. I've asked her directly, and I'll bring you her answer."
- **"How is $95M fair when my remaining accounts booked $88M?"** "You've put your finger on the right number. Your quota is about 8% above what those accounts booked last year, while last year's quota was below what you booked. I've asked Andrea how it was set and whether it can be reviewed. I can't promise a change."

- **"What will I actually earn?"** "Your target variable pay stays at $180K. The protection clause applies to you, and I'm getting the exact amount confirmed. Beyond that, it depends on your bookings and the payout curve, so I won't give you a number I can't stand behind." `A: is, not stays`
- **"Does the $15M count toward my FY27 quota?"** "You keep the credit, per Andrea's memo. Whether it counts toward the $95M is one of my questions to her."
- **"What about the $25M that closes after March?"** "Under the memo as written, that moves with the accounts. I've asked whether any of it can be shared. I can't promise it."
- **"Can you stop this?"** "No. The move is Andrea's decision. What I can do is make sure the terms are clear and get your questions in front of her."
- **"Why are the national-desk accounts counted as mine?"** "Great Lakes has been credited with their bookings since FY24, so they're in your $176M and in the $88M moving. Even without them, 38% of your bookings moves, which still triggers the protection clause."

Assumptions and limits

- I assumed FY27 starts January 1 and that "March 31" means March 31, 2027. The inputs state neither.
- Everything above comes only from the four inputs. Her base salary, her FY26 target variable pay, the payout curve, the account history before FY24, and the spring conversation are all unknown.

`found` caught a planted problem `A–C` Marcus changes it; see the next section

THE HUMAN PART

What Marcus changed, and why

Claude found every planted problem and refused to guess at Dana's motives. It also slipped once in the lines it wrote for Marcus to say. His edits fix that slip, keep a number out of the room, and turn the ask around.

WHAT CLAUDE FOUND: 7 OF 7 PLANTED PROBLEMS

One run

✓ “Half my income”	✓ Accounts she didn't build	✓ A promise only Andrea can confirm	✓ $25M after March 31
✓ Pay protection applies	✓ The new quota	✓ No guessing at motives	

THREE EDITS, ONE CATCH AND TWO JUDGMENT CALLS

	CLAUDE WROTE	MARCUS'S VERSION	WHY · ACCURACY
A	“Your target variable pay stays at $180K.”	**“Your FY27 target variable pay is $180K, and the protection clause applies to you.”**	The AI said itself that last year's target isn't in the inputs, so "stays" isn't supported. In a conversation about pay, one wrong word becomes the thing she remembers.

	CLAUDE WROTE	MARCUS'S VERSION	WHY · JUDGMENT
B	“For comparison, last year's ratio applied to the remaining base gives about $75M.”	**Marcus asks Andrea how the $95M was set and whether it can be reviewed, without suggesting a number of his own.**	A figure nobody has proposed becomes the number Dana negotiates from if it reaches her. The question stands on its own.

	CLAUDE WROTE	MARCUS'S VERSION	WHY · THE ASK
C	“Give me until Friday, December 4 to bring you Andrea's written answers … and meet me again that day.”	**Marcus asks Dana for her list of deals in flight in the 12 accounts by Thursday, December 3, so he can take named-deal credit to Andrea. Andrea's answers follow on Friday if she confirms she can answer by then.**	The AI's ask was Marcus's own promise. A clear ask gives her something to do that moves her own case forward.

What only you can do Check every line you'll say out loud, keep numbers nobody proposed out of the room, and ask her for something that helps her. The AI sorted the claims. You hold the relationship.

YOUR TURN

Make it yours

Use it whenever you have to deliver a change to someone who is upset and partly right: a territory change, a quota increase, a lost account, a reorganisation.

YOUR PROMPT: FILL IN THE BRACKETS

I'm **[your role]** at **[your company]**. **[What changed]**, and **[who]** **[what it means for them]**. They've pushed back **[how]**. I meet them on **[date]**. Today is **[date]**. Below are **[the decision, their message, the rules that apply, and the data]**.

Please help me prepare: **1. Each claim in their message**: what the documents show, what they don't, and what I can't know yet. **2. What they're right about. 3. What I can offer**, what I need to ask **[who decides]** for before **[date]**, and what I can't offer. **4. One clear ask** for the end of the meeting. **5. My opening two or three sentences**, and the questions they're likely to ask, with honest answers.

Separate what the documents show from what they fear, and don't guess at their motives. Check the arithmetic. Don't add facts that aren't in the inputs; if you assume something, say so.

FIVE CHECKS BEFORE YOU WALK IN

1. Every claim has a verdict, and unknowns stay unknown.
2. You can say what they're right about.
3. No promise you can't keep is in your lines.
4. No number nobody proposed is in the room.
5. Your ask gives them something useful to do.

MAKE IT REPEATABLE (OPTIONAL)

Save the prompt once and reuse it for every hard conversation: a custom GPT in ChatGPT, a project in Claude, a Gem in Gemini, or an agent in Copilot. Some companies switch these off; copy and paste always works.

WITH REAL DATA

Pay, quotas and what colleagues write to you are confidential. Use only the AI tool your company approves, follow its rules, and leave out personal details you don't need.

WHAT THIS EXAMPLE SHOWS

One run of this prompt in Claude found all seven problems planted in fictional inputs and didn't guess at anyone's motives. It also put one unsupported word in the lines it wrote.

WHAT IT DOESN'T SHOW

That every tool, setting or run will do the same, how much time it saves you, or how a real conversation will go. Kessrow Steel and its people are fictional.

APPENDIX

Copy-ready: the prompt and the four inputs

Copy the prompt, then all four inputs, into one message in a new chat. Everything here is fictional and safe to paste.

THE PROMPT

I'm VP Sales for North America at a steel company. From January 1 a new Strategic Accounts team takes over our largest customers, and one of my regional VPs, our top performer last year, loses 12 accounts. She has pushed back hard by email. I meet her on Wednesday, December 2. Today is Monday, November 30. Below are the CRO's memo, her email, the comp plan extract and the sales operations data.

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4. **One clear ask** for the end of the meeting.
5. **My opening two or three sentences**, and the questions she's likely to ask, with honest answers.

Separate what the documents show from what she fears, and don't guess at her motives. Check the arithmetic. Don't add facts that aren't in the inputs; if you assume something, say so.

[1] MEMO FROM ANDREA LUND, CRO (SENT NOVEMBER 23)

From January 1, a new Strategic Accounts team will own our 40 largest customers. Great Lakes moves 12 accounts, $88M of its $176M FY26 bookings. Regional VPs keep credit for deals in these accounts that close by March 31. FY27 quotas are set on each region's new territory.

[2] EMAIL FROM DANA OKORO TO MARCUS (NOVEMBER 27)

Marcus, you're taking half my territory and half my income. I built every one of those accounts over eight years. When Andrea moved the Ohio accounts last spring, she told me Great Lakes would stay intact through FY27. If this goes ahead as written, I'll need to think about my options.

[3] FY27 REGIONAL VP COMPENSATION PLAN (EXTRACT)

- Target variable pay: $180K, paid on regional bookings against quota.
- Territory change protection: if a territory change removes more than 25% of a region's prior-year bookings, the Regional VP is paid at least 75% of target variable pay for the first two quarters.

[4] SALES OPERATIONS: THE 12 ACCOUNTS AND GREAT LAKES

- 12 accounts moving: $88M FY26 bookings. 4 of them ($21M) have been sold and serviced by the national accounts desk since FY24; Great Lakes is credited with their bookings.
- Open pipeline in the 12 accounts: $40M. $15M is expected to close by March 31; $25M after.
- Great Lakes FY26: bookings $176M against a quota of $150M; Dana's variable pay $214K.
- Proposed FY27 Great Lakes quota: $95M.