

Deal Desk Implementation Guide

A 4-week roadmap to build and launch your deal desk operating model.

This guide provides a structured, phase-by-phase approach to designing, building, and launching a deal desk function. Each phase includes specific activities, responsible parties, and measurable outputs to keep your implementation on track.

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|-----------------|---------------------------------|---------|
| Phase 01 | Audit & Design | Week 1 |
| Phase 02 | Build the Infrastructure | Week 2 |
| Phase 03 | Roll Out & Train | Week 3 |
| Phase 04 | Measure & Optimize | Week 4+ |

Audit & Design

DISCOVERY

Map your current approval paths end-to-end, identify bottlenecks that slow deals, and design your target-state discount authority matrix. This phase sets the foundation for every system and workflow you will build in Phase 02.

Key Activities

- 1 Document every current approval path from rep request to final sign-off, noting handoff points, average wait times, and decision-makers at each stage.
- 2 Interview sales reps, managers, finance, and legal to surface the top friction points and undocumented workarounds teams currently use.
- 3 Analyze 90 days of closed-won and closed-lost deals to quantify how approval delays impact win rates, cycle time, and average deal size.
- 4 Draft a tiered discount authority matrix defining who can approve what percentage discount, at which deal size, and with which escalation path.
- 5 Align stakeholders (CRO, CFO, VP Sales, Legal) on the proposed authority matrix and secure sign-off before building.

Deliverables

- Current-state approval flow map
- Bottleneck analysis with quantified impact
- Draft discount authority matrix
- Stakeholder sign-off memo

Build the Infrastructure

CONFIGURATION

Turn your approved design into live systems. Configure CRM routing rules, build the deal desk request form, set up automated approval workflows, and connect your CPQ or quoting tool so deals flow through the new process automatically.

Key Activities

- 1 Create a "Deal Type" or "Approval Category" field in your CRM and configure routing rules that send deals to the correct approver based on discount tier and deal size.
- 2 Build a standardized deal desk request form (web form, Slack workflow, or CRM screen) that captures deal size, discount requested, justification, and urgency level.
- 3 Configure automated approval workflows with built-in SLA timers, escalation paths for overdue approvals, and notification triggers for each approver.
- 4 Connect CPQ / quoting tool so approved pricing automatically populates the quote, eliminating manual re-entry and reducing errors.
- 5 Set up an SLA tracking dashboard that shows real-time approval queue depth, average response time, and SLA compliance rate.

Deliverables

- CRM deal-type field and routing rules (live)
- Standardized deal desk request form (live)
- Automated approval workflows with SLA timers
- CPQ integration for auto-populated quotes
- SLA tracking dashboard

Roll Out & Train

ENABLEMENT

Launch the deal desk to your revenue team. Train reps on how and when to submit requests, train approvers on SLA expectations, distribute quick-reference materials, and run pilot deals through the system to validate the process before full rollout.

Key Activities

- 1 Conduct a 30-minute enablement session for all reps covering: when to use the deal desk, how to submit a request, what information is required, and expected turnaround times.
- 2 Run a separate session for approvers (managers, finance, legal) covering: SLA expectations, escalation protocol, how to approve/reject in the system, and where to flag edge cases.
- 3 Create and distribute a one-page quick-reference guide with the authority matrix, submission steps, SLA targets, and escalation contacts.
- 4 Run 10-15 pilot deals through the full workflow, documenting any friction points, system bugs, or confusion that surface during real usage.
- 5 Debrief the pilot results with the deal desk team and adjust routing rules, form fields, or SLA targets based on findings.

Deliverables

- Rep enablement session (recorded)
- Approver training session (recorded)
- One-page quick-reference guide
- Pilot results report with adjustments

Measure & Optimize

ITERATION

Track the operational health of your deal desk through SLA compliance, approval cycle time, and deal velocity metrics. Use data to continuously optimize routing rules, authority thresholds, and team capacity.

Key Activities

- 1 Monitor SLA compliance rate weekly, targeting 90%+ of approvals completed within the defined SLA window for each tier.
- 2 Track average approval cycle time by deal type, discount tier, and approver to identify persistent bottlenecks or capacity constraints.
- 3 Compare deal velocity (days from opportunity creation to close) before and after deal desk launch to quantify the business impact.
- 4 Review escalation frequency and reasons monthly to determine if authority thresholds need adjustment or if specific deal types need new routing paths.
- 5 Conduct a monthly deal desk review with the CRO and finance to discuss exception trends, policy refinements, and upcoming changes (new products, pricing changes, territory shifts).

Deliverables

- Weekly SLA compliance dashboard
- Average approval time by tier and approver
- Before/after deal velocity comparison report
- Monthly deal desk review cadence (recurring)

Launch Checklist

Week 1

- Current-state approval flows documented
- Bottleneck analysis complete
- Discount authority matrix drafted
- Stakeholder sign-off obtained

Week 2

- CRM routing rules configured
- Deal desk request form live
- Approval workflows with SLA timers active
- CPQ integration tested
- SLA dashboard operational

Week 3

- Rep enablement session delivered
- Approver training complete
- Quick-reference guide distributed
- Pilot deals processed and debriefed

Week 4+

- Weekly SLA reporting cadence set
- Cycle time baseline established
- Before/after velocity comparison shared
- Monthly review cadence scheduled