

# The Founder *Extraction* Playbook

How to systematically remove yourself from the day-to-day of sales — without revenue dipping. The four phases, the sequence, and what makes it hard.

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# How to use *this playbook*

This is a working document, not a manifesto. Work through it in order. Each phase depends on the one before it — you can't transfer authority before you've extracted the knowledge, and you can't step back before the process is structural.

Expect the full extraction to take three to six months. Compressed timelines produce exactly the outcome founders fear: revenue dip, reps who can't cope, and a founder who re-inserts themselves. Do it in stages, with patience.

**The honest prerequisite:** This playbook requires that you already have at least one rep or a clear plan to hire one. If you're the only person in your revenue function, the first job is building the team. Extraction can't happen without someone to extract to.

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## STEP 1 · DIAGNOSIS

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### Is your revenue *founder-dependent?*

Before working through the four phases, establish your baseline. Check every statement that's currently true in your business:



Every deal above a certain size requires your involvement to progress

Prospects specifically ask for you by name during the sales process

Pipeline stalls or goes quiet when you're unavailable for more than a week

Your reps can open conversations but consistently fail to close independently

You personally wrote or significantly shaped the last three winning proposals

There is no written sales process — it exists only in your head

New reps are taking 9–12 months to ramp (should be 3–4)

You cannot confidently predict your revenue 90 days out

If you checked five or more, your extraction work is urgent, not optional. If you checked three or four, you're in early-stage dependency — the right time to build the infrastructure before the problem becomes a ceiling. If fewer than three, you may be further along than you think — use this playbook to identify the remaining gaps.

#### PHASE 1 OF 4



## Extract the knowledge

DOCUMENT BEFORE YOU DELEGATE

Before you can step back, everything that exists in your head needs to exist in writing. This is the most underestimated part of the process — and the most common reason extraction fails.

Most founders believe they can describe their sales approach. When you actually try to capture it in a form someone else could follow, the gaps appear quickly: the way you run discovery, the objections you handle effortlessly, the pattern-matching you do in five minutes that tells you whether a deal is real. That's not mysterious — it's experience. But experience that lives in one person's head cannot be transferred or replicated.

### THE FOUR DOCUMENTS TO BUILD

## Discovery guide

The questions you ask in discovery, in roughly what order, and what you're listening for in the answers. Not a script — a structured guide a good rep can adapt to the conversation. Capture: the opening question that works, the three or four diagnostic questions that reveal whether there's a real problem, the signals that tell you the timing is right, and the way you close a discovery call.

## Objection handling guide

List the ten most common objections you hear. For each: the underlying concern (not just the surface objection), your response approach, and the follow-up if the initial response doesn't land. The underlying concern matters because reps who only know the surface response will deploy it robotically. Reps who understand the concern can adapt.

## Deal review criteria

How do you assess whether a deal is real? What signals tell you it's going to close? What red flags suggest it won't? This is the hardest document to write because it captures pattern recognition built over years — but it's the most valuable. Force yourself to write it in specific terms: not "I can tell when a deal is real" but "a real deal has these four observable characteristics."

## Proposal template

The structure and language of a winning proposal, built from deals that have closed. What sections, what order, what level of personalisation, what commercial framing works. Include your standard pricing structure, discount parameters, and the terms you consider non-negotiable.

### PHASE 1 DELIVERABLES

- Discovery guide (structured questions + what to listen for)
- Objection handling guide (10+ objections, underlying concerns, responses)
- Deal review criteria (the signals that tell you a deal is real)
- Proposal template (structure, language, commercial parameters)
- ICP definition (written down, with negative examples)

**Don't wait for perfection.** An imperfect document that exists is infinitely more useful than a perfect one that doesn't. Write 80% of what you know in a day. The gaps will reveal themselves when reps start using it.

#### PHASE 2 OF 4

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## Transfer commercial authority

GIVE THEM THE ABILITY TO DECIDE

Reps can't close independently if they can't make commercial decisions. This isn't about unlimited discretion — it's about defined parameters within which the rep can act without escalation.

Most reps in founder-led businesses have very limited commercial authority. This is partly because founders understandably worry about margin, and partly because reps have never needed to develop it. Changing this requires both defining the parameters and letting them use them — even when you'd have handled it differently.

### DEFINE THE AUTHORITY MATRIX

Work through each commercial decision type and define the rep's scope:

- Pricing flexibility:** What discount range can a rep offer without approval? (e.g., up to 10% without asking)
- Proposal approval:** Can reps send proposals independently, or do they need sign-off? At what deal size?
- Deal extensions:** Can reps extend a proposal deadline or adjust payment terms without escalation?
- Custom terms:** What contract variations can a rep agree to? Which require legal/founder review?
- Scope additions:** Can reps offer additional services or features as part of negotiation?
- Executive escalation:** When is it appropriate (and expected) for a rep to bring you in?

**On discomfort:** Watching a rep handle a commercial conversation differently than you would is the price of extraction. You'll close the gap in time. You won't close the gap if you keep doing it yourself.

- Written authority matrix (what each role can decide independently)
- Pricing parameters document (discount bands, non-negotiables)
- Escalation criteria (the specific circumstances that warrant founder involvement)
- Rep has sent at least 3 proposals independently

#### PHASE 3 OF 4

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## Change the process

STRUCTURAL CHANGE, NOT ROLE CHANGE

The third phase is structural. The process needs to be designed so it does not require founder involvement to advance. This is where most partial extraction attempts fail — they change roles (who is doing what) without changing process (how deals move forward). As soon as pressure builds, the founder re-inserts.

### THE CRM IS THE PROCESS

If the process lives in the CRM — qualification checkpoints, stage exit criteria, discovery notes that any senior person can read and assess — the founder is no longer the node through which information flows. The system holds it.

- Stage exit criteria documented:** Each CRM stage has written criteria a deal must meet to progress — not founder approval
- Discovery notes required:** Reps must log the problem, cost of inaction, decision process, and timeline before a deal advances to proposal
- Pipeline review runs without you:** The weekly review is run by the sales lead; you attend as observer or not at all
- Proposals sent on template:** Based on rep judgement + template, not pending your review
- Win/loss captured in CRM:** Not just outcomes — the reasons, by rep, to enable coaching

### THE REPORTING YOU NEED

When you're no longer in every deal, your visibility comes from the data. Build these reports before you step back:

**WEEKLY** Pipeline coverage ratio · New deals added vs. lost · Stage progression by rep

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**MONTHLY** Close rate by rep · Average deal size · Sales cycle length · Win/loss reasons

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**QUARTERLY** Rep ramp progress · Conversion by stage · ICP accuracy (are we winning the right deals?)

#### PHASE 3 DELIVERABLES

- CRM stage exit criteria (written for each stage, enforced in tool)
- Weekly pipeline review running independently for 4+ weeks
- Weekly/monthly dashboards built and being reviewed
- Discovery notes completed on 80%+ of active deals

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#### PHASE 4 OF 4

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## Step back in stages

GRADUATED, NOT SUDDEN

The final phase is the actual stepping back. This should be staged, not sudden — sudden extraction almost always produces exactly the outcome founders fear.

### THE GRADUATION FRAMEWORK

**STAGE 1** **Subset of deals.** Pick 3–5 deals where the rep has the strongest relationship and the problem is clearly defined. Remove yourself from those deal reviews explicitly. Tell the rep: "You're running these. I'm available if you need me, but I won't be on the review calls." Track outcomes for 4–6 weeks.

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**STAGE 2** **Expand the subset.** Add more deals to the rep's independent portfolio, including some that are less straightforward. You review the data weekly but stay out of the calls. This stage tests the process — deals that stall tell you where the documentation or authority gaps are.

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**STAGE 3** **Exceptions only.** Your involvement is genuinely exceptional: the largest strategic accounts, the most complex commercial structures, situations where your specific relationships are the differentiating factor. Everything else runs without you.

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**STAGE 4**     **Steady state.** You're in the weekly review as a business leader reviewing the function — not as a sales leader running the deals. You have a commercial lead (internal or fractional) who owns the number. You're available for strategic input, not day-to-day execution.

#### THE METRIC TO WATCH

Close rate by rep — not close rate overall. If individual rep close rates are improving or stable, the process is working. If they're declining, you have a coaching problem, not a structural one. Don't step back further until that's resolved.

#### PHASE 4 MILESTONES

- At least one rep closing deals independently for 60+ consecutive days
- Your involvement limited to strategic or exceptionally complex deals
- Pipeline reviews running without you for 8+ weeks
- Close rate by rep tracked and within 15% of your historical rate

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#### THE HARDER PART

## What it takes *from you*

The hard part of founder extraction isn't the documentation or the process design. It's tolerating the discomfort of stepping back before the process has proven itself.

There will be deals that don't close the way you would have closed them. There will be reps who handle commercial conversations differently — sometimes less elegantly. There will be moments where you could have stepped in and won the deal, but you didn't, and it was lost.

That is the cost of building a scalable business rather than maintaining a founder-dependent one. The alternative — staying in every deal indefinitely — is also a cost, just one that's harder to see because it's distributed across thousands of decisions rather than crystallised in a single lost deal.



The businesses that do this well are the ones where the founder decides to pay the short-term cost consciously — because they understand what they're buying with it: a business that can grow without them, that's more valuable at exit, and that they can actually take a holiday from.

WORK WITH UNFYS

## Want someone to run this process with you?

Every UNFYS engagement begins with a structured diagnostic — Discovery Week — that maps exactly where your revenue function stands, what the founder dependency looks like, and what the extraction sequence should be. Most engagements move into a Fractional or Project scope from there. If you're ready to start, reach out.

[GET IN TOUCH](#)