

The Omnira *Method*

Our sales methodology, distilled from 320+ recorded meetings: every client call we ran from July 2025 to August 2026, and every internal session where we argued the doctrine into shape. This is written for the people selling on our behalf: advisors, partners, and reps. It is how we think, turned into something you can run.

01 • THE PREMISE

One belief under everything

The method rests on a single conviction the founders arrived at independently and kept converging on: **diagnosis earns the right to sell**. We never pitch into a business we have not understood, we never quote a price that is not anchored to the prospect's own numbers, and we never promise what the data does not support. Curiosity is the engine, the audit is the product of the curiosity, and everything else follows.

02 • THE SPINE

Six movements, in order

Every deal moves through these six. Skipping one is where deals died in our history, so the order is the method.

I The inception call: sell nothing

First contact is genuine-curiosity discovery. The goal is complete clarity on the owner's story, goals, and motivations, and nothing else. **Do not pitch. Do not quote. Do not solve.** Let them talk 20+ minutes before anything resembling an offer appears; every clean close in our history started this way, and every demo-heavy discovery-light call stalled.

Trejon's doctrine, Oct 2025, unchanged since. Validated across the full external corpus.

II Route: grow, sell, or acquire

Once trust exists, the routing question: **"Are you growing, or open to selling?"** Every owner exits triage into one of three lanes, each with a matched offer: grow (the 90-day engagement), sell (brokering through the network), acquire (capital lane and deal sourcing). No answer is off-script: buyers found in seller conversations become matchmaking inventory, sub-threshold businesses get referred with a fee attached, unprofitable ones get an asset-sale path.

Warning from our own history: this question failed as a cold opener (adopted Oct 2025, reversed 11 days later, it disqualified growth-focused owners). It works only after trust. Sequence determines whether a question qualifies or disqualifies.

III Diagnose for money: the paid audit

The audit is the offer's front door and the method's heart. Two weeks embedded, the 10 Value Levers scored, every finding a number, strengths captured alongside gaps. Structure the output as **Find Money / Make Money**: one column of costs to cut and cash to recover (subscriptions, AR days, expensive debt), one column of revenue to create (dormant database, follow-up, partnerships, capital). Reactivation launches during the audit so value is visible before the plan is even presented.

The paid audit replaced our free 72-hour valuation era: free diagnostics attracted volume, paid ones filter for serious owners and fund delivery. Keep the 72-hour speed ethic anyway.

IV Offer in tiers: choose between yeses

Never present one option. Two or three structures, always: lighter versus full, aggressive versus conservative, done-for-you versus license. The prospect chooses between yeses instead of choosing yes or no. **Condition price before naming it**, with their own economics: what a customer is worth to them, what their dormant list holds, what the owner-dependence discount is costing. Flex terms, never price: split payments, dated starts tied to their liquidity events, creative structures. A split is not a discount.

Every winning proposal in the corpus was priced against a number the prospect said out loud. Tiered offers closed deals single offers lost, Oct 2025 onward.

V Install and prove: the expectation ledger

Trust is a ledger of kept promises. Set a small expectation, fulfill it, repeat, then propose the next thing. Success criteria agreed in writing before any install. Revenue work first (it pays for the engagement), independence second, dashboards third. When something breaks, **fix it in front of the client and own it before they find it**: live fixes built our strongest relationships, silent failures nearly lost our biggest account. And sell nothing from the roadmap while the current promise is undelivered.

The Exit Systems arc and the Uroš arc, Nov 2025 to Mar 2026: same bugs, opposite outcomes, the difference was presence.

VI Expand, and route every no

Delight first, then expand: the renewal conversation opens after a wow moment, not before. Credit clients for product direction, it converts users into stakeholders. And every no is a routing decision: not-ready prospects become referral sources, no-exit owners become buyers and financing partners, vendors become co-builds. Ask for referrals at the high point, hand the referrer a two-sentence blurb and the booking link, and close the loop on every intro. **Nothing exits the pipeline without a value attempt.**

Every gracefully handled mismatch in 14 months produced something. Zero forced mismatches closed.

Each proven in the record, stated so you can apply it tomorrow.

Revenue-driver test

Before adopting any title, offer name, or positioning, ask: will the buyer book this under revenue or cost? Chief Growth Officer passed. AI consultant failed.

Oct 2025

Sell the retained value

Justify every fee by what the client keeps, not what they pay. "This costs \$X" loses to "you keep \$Y."

Aug 2025

Cost-stack pricing, premium anchor

Enumerate unit costs, price well above the stack, anchor high, concede only to a pre-decided floor.

Oct-Nov 2025

The 5-step booking ladder

Validate, earn a trust-yes with a known fact, frame the call as discovery, assume the close with a specific low-friction slot, set expectations immediately after.

Oct 2025

Under-promise, reverse the risk

Price trust into the design, not into a discount: guarantees, testable samples, subsidized trials. Conservative projections only.

Trejon, Jul 2025 onward

Never confront the seller

Seller-facing language gets scrubbed of confrontation: the offer is an opportunity to work together, supporting the operation, never taking it over.

Trejon, Oct 2025

Multiple-arbitrage math

The one whiteboard every rep must be able to draw: buy at a small multiple, combine, exit the larger entity at a bigger multiple. Same dollars, roughly twice the value at scale.

Verified: IBBA and GF Data 2025

Approve, codify, automate

Humans approve AI output first, the approval data codifies what works, automation is earned never assumed. Applies to reps too.

Oct 2025 to present

Prove-it-first partnership

No seat, title, or equity until the person demonstrates short-term revenue contribution. Momentum before commitments.

Nov 2025

Keep the strategic asset

Collaborate freely on layers, never cede the data platform, the brand, or go-to-market control. Structure deals so the counterpart feels like the winner.

Nov-Dec 2025

Document, then train

No process scales until someone traced the full workflow, wrote it down, and can train from the document. Teach only what we have actually done.

Trejon, Nov 2025

Expectation resets over over-promising

When a prospect's expectations are disconnected from market reality, correct them with data or downgrade the engagement. Never match the fantasy.

Sep 2025

04 • THE THREE MINDS

Working with the founders

Advisors and partners interface with three different thinkers. Bring the right question to the right person.

Sam: structure, positioning, and control of assets

Sam prices from intelligence and retained value, positions everything on the revenue line, and holds one hard line: **the core asset (data, brand, GTM) is never ceded in any partnership**. He believes integrated systems beat point solutions, boring businesses beat glamour, and AI wins as a layer on real competency, not as the product. He corrects prospect expectations even at the risk of the deal, and turns every relationship bidirectional: clients become acquisitions, rejected vendors become financing angles.

Bring Sam: deal structure, positioning language, asset-control questions, anything where the category or the leverage is unclear. **Expect:** excitement about unit economics discovered live, and zero patience for hype selling or unearned equity asks.

Trejon: seller psychology, deals, and the network

Trejon sells emotion before finance: increase a seller's likelihood of selling **to you specifically**, through curiosity, pain-avoidance, and pleasure-gain. His first-call doctrine is the inception call. He under-promises and reverses risk by design, aligns incentives through success fees, hunts where the biggest checks live, and judges people slowly, extending good faith where Sam reads risk. He carries the mission frame that gives the work its urgency.

Bring Trejon: seller psychology, deal framing, network and relationship strategy, anything emotional or high-stakes with an owner. **Expect:** he will make the counterpart feel like the winner, and he will not let you train on theory you have not lived.

Harrison: buildability, economics, and simplification

Harrison builds over buying and then measures it, engineers margins from unit costs upward, and removes structure that does not earn its keep: configuration over duplication, simplify the dedupe, cut the vendor the data says is redundant. He honors committed prices, filters people through revenue, and treats AI as a deterministic tool he still understands. Speed to launch beats structural purity, but everything is finished before handoff.

Bring Harrison: what is buildable, what it really costs, what should be simplified, and any promise a rep wants to make that touches the platform. **Expect:** pushback on complexity and on people who have not yet produced revenue, and cost math tracked to the day.

The pair dynamics matter too: the advisory and equity doctrine came out of Sam + Trejon sessions, the data and product doctrine out of Sam + Harrison marathons. The current offer is the merge of both lanes.

Four evolutions, one line each

Positioning climbed a ladder and kept every rung

Selling activity, then data, then intelligence, then operating outcomes. Each pivot kept the layer below as infrastructure. The lesson for reps: we sell outcomes, but the machinery underneath is a moat, mention it as proof, never as the product.

Sequence decides what a question does

The same "growing or selling" question disqualified prospects as a cold opener and routes them perfectly once trust exists. Before you borrow any tactic, ask where in the sequence it belongs.

Lower the entry bar, raise the proof bar

Rep recruiting moved from certifications and bootcamps to commission-only, while the proof standard moved from enthusiasm to revenue. Easy to join, impossible to fake.

Pricing stabilized on three rules

Price from the cost stack up but anchor premium. Frame fees by what the client retains. Put real upside in success fees and equity so incentives align. The paid audit is all three rules in one product.

What to record while we do this by hand

Every doctrine change we ever made came from data we happened to have. The manual phase makes that data deliberate: advisors and reps record the following on every account, and the platform learns the method the way the founders did, from recorded reality.

Per lead and conversation

- Industry (clean taxonomy), revenue band, owner-operated flag
- Lead cost and source, enrichment provenance and verification status
- The routing answer (grow, sell, acquire, undecided) with date
- Goals, pains, and timeline in the owner's own words
- Script and message variant used, objections raised and the response that was tried
- Call recordings tagged by rep and outcome
- Expectations set and fulfilled, no-shows and recovery outcomes

Per audit, offer, and rep

- Document checklist status, 10-lever scores, Find Money and Make Money items with dollar estimates
- Dormant list size and age, deliverable turnaround time
- Tiers presented AND the tiers not chosen
- Deal structure components: fee, success fee, bonus, warrants, payment terms
- Where disqualified deals were routed and whether a fee attached
- Rep funnel: recruited, trained on AI practice agents, first conversation, first booking, first commission
- Human edits to AI drafts: the training set for future autonomy

Distilled from 175 external and 144 internal Fathom-recorded meetings, July 2025 to August 2026, plus the verified market research on file. Companions: the closing playbook, the audit field manual, and the idea vault. Full syntheses with dated citations live in sales-intel.

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