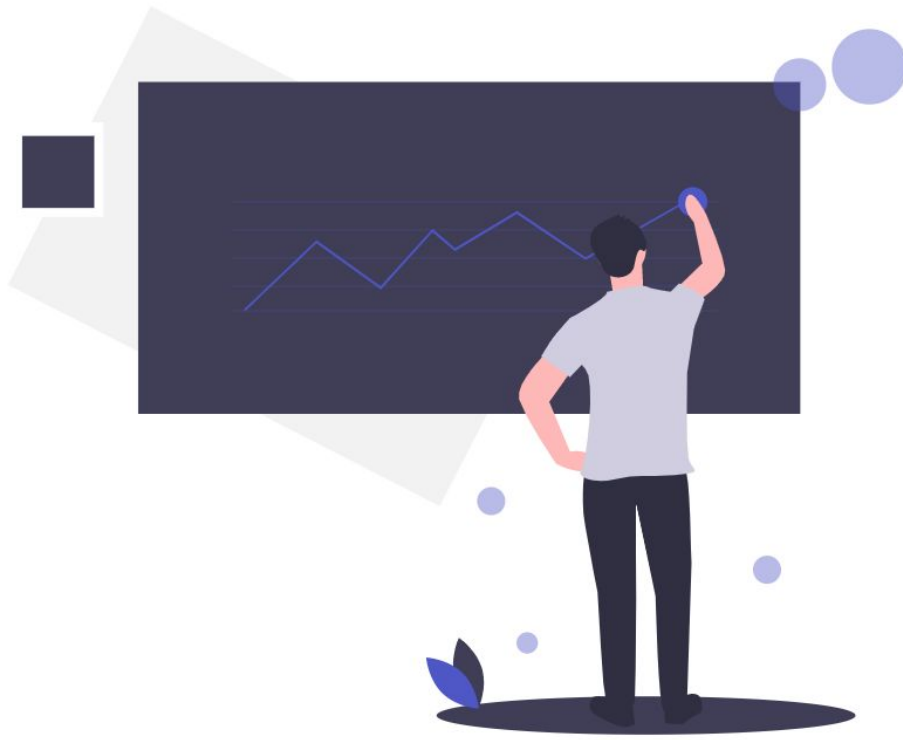


DEAL EVALUATION CHECKLIST



**RoundUp
Sales**

What do I know? What do I still need to know?	
What is their explicit need, want, challenge, desire?	
What is their buying process? Who is involved? What step in the process am I currently in? Have I thoroughly completed all of the steps to here? If not, go back. If so, move forward.	
What's their role in the decision making process? What can you do to get exposure to everyone in the decision making process?	
Has the budget been discussed? Do they have it? If not, can they get it?	
Who have my meetings been all about – them or me?	
Have I been approaching this collaboratively and as a strategic business partner or more like just another vendor?	
What is the personality and preferred communication style of each person I've been presenting to? Have I been communicating with them in their language?	
Have we discussed the risks and rewards to moving forward or is that the elephant in the room?	
If I had it to do over, what would I have done differently? How can I use that information as I move forward?	
Have we offered unique and valuable perspectives throughout the engagement?	
Have we shown knowledge of the client business, and helped him avoid problems?	
Won / Lost?	
What are the 3 key things that went particularly well?	- - -
If I had it to do over, what are the 3 key things I should have done differently?	- - -

THANK YOU FOR YOUR TIME

REACH OUT IF YOU WANT TO KNOW MORE

