

Qualified Prospect Formula® Opportunity Assessment Tool (Extended)

Qualified Prospect = VisionMatch Differentiated X Value X Power X Plan®

VisionMatch₀: Creating a Differentiated VisionMatch™ | Should they buy from us?

- ✓ What is the business issue?
- ✓ Is it a business issue or a technical problem?
- ✓ Can it be directly related to revenue or profit?
- ✓ Has the prospect acknowledged the business issue?
- ✓ What are the problems or challenges that make this issue difficult to solve?
- ✓ Is there agreement on the underlying problems?
- ✓ Have we identified problems that only we can solve?
- ✓ Has our uniqueness been mapped to specific problems?
- ✓ Would the prospect say any of the solution requirements are unique or differentiated?
- ✓ Did the prospect confirm this information? In a letter?

Value: Creating the Value of a Differentiated VisionMatch | Is it worth it?

- ✓ What is the value?
- ✓ Was the business value uncovered and offered by prospect?
(versus being told to the prospect)
- ✓ Do they agree with the potential value to their business?
- ✓ Has the business value been quantified?
- ✓ Has a cost justification or ROI been completed and how does its value rank with other potential investments they are considering?
- ✓ Was any personal value uncovered?
- ✓ Do we understand the personal value of the ultimate power person?
- ✓ How does this value rank with other personal priorities they have?
- ✓ Did it come from the customer? (or assumed?)
- ✓ Did the prospect confirm this information? In a letter?



Power: Access to Power | Can they buy from us?

- ✓ Who makes the decision?
- ✓ Have they made a decision of this scope before?
- ✓ Do we have access to the power person and validated that they have the ultimate decision-making authority?
- ✓ Does the purchase price logically fit the authority of this person?
- ✓ Does the power person have access to funds or a plan to obtain any additional funds required? Confirmed or assumed?
- ✓ Can we bargain for access based upon plan requirements?
- ✓ Is this confirmed in a letter?

Plan: Mitigating the risk | When will they buy from us?

- ✓ Has the power person agreed to a mutual plan of activities to convince them and their subordinates to do business with us?
- ✓ If this plan is with a sponsor, does it include access to the decision-maker at some point?
- ✓ Are there logical checkpoints for decision-maker review? Planned access and/or conditional access?
- ✓ Does this plan have regular milestones or checkpoints, and has client agreed to schedule meetings with us to review progress?
- ✓ Has client agreed to a completion date that maps to their urgency to act or compelling event?
- ✓ Has the plan been mutually developed?
- ✓ Does the plan include all the steps necessary for the prospect to be successful? (or does it stop at the purchase order?)
- ✓ Is the plan in writing and confirmed in a letter?