**ROLE/INDUSTRY**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| *Company:* |  | *Role:* |  | *Industry:* |  | *Date:* |

**BUSINESS ISSUE**

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| --- | --- | --- |
| *Describe the high-level strategic goal that the individual you are calling on must achieve this year to contribute to the corporate objective. Could be more than one goal. Must have a struggle associated with it, or they won’t need your solution. Typically what the individual is measured on at review time.* |  | *Notes:* |

**ANXIETY QUESTION**

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| *Create an anxiety question that is short, creates an emotional impact, and makes the prospect experience the negative impact of not implementing your solution. Use only as a last resort and avoid making it personal.* |  | **Anxiety Question Examples:**  What might be the impact to your business if you do not resolve or achieve \_\_\_ (name their #1 Business Issue here), or if it is not resolved in time? |

**Problem**

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| *List the problems that prevent the individual from resolving their Business Issue(s), in their words. Which probing questions did they agree with?* |  | **O-P-C Question Examples:**  **Open:** What stands in the way of resolving (name their #1 Business Issue here)?  **Probe:** Is it challenging for you to \_\_\_?  **Confirm:** What I’m hearing is \_\_\_. Is that correct? |
|  | *Notes:* |

**Solution**

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| *List the solutions/capabilities that the individual said will solve their challenges/address their Business Issue(s). These capabilities might be provided by you or a competitor. As you capture these, note which are the ones only you can provide.* |  | **O-P-C Question Examples:**  **Open:** What capabilities do you think will solve these challenges?  **Probe:** Has anyone shown you \_\_\_\_?  **Confirm:** Will these capabilities enable you to solve (name their #1 Business Issue here)? |
|  | *Notes:* |

**VALUE**

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| --- | --- | --- |
| ***Business Value:*** *Describe how the individual will measure the quantifiable impact of your solution on their Business Issue in terms of business value. It should be expressed in hard numbers that a CFO would recognize (revenue increase, operating expense reduction, inventory reduction, etc.)* |  | **O-P-C Question Examples:**  **Open:** How will you measure the value of our solution?  **BV PROBE:** When we help you solve (name problem #1, #2, #3, etc.), will that (increase revenue, improve productivity/efficiencies, mitigate risk, etc.)?  **PV PROBE:** Is there an upside to you and your team as well?  **Confirm:** Do you see enough value to move forward with us?  *Notes:* |
| ***Personal Value:*** *Describe what having your solution will do for the individual, personally. Examples: Will it improve their résumé? Will they be viewed as a hero/visionary? Might they receive a bonus, a promotion, etc.?* |  |

**Power**

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| --- | --- | --- |
| *Identify all stakeholders as user/technical/economic buyer and/or champion/saboteur. The economic buyer is the one who has the power to make or veto the ultimate decision. Include your prospect’s decision-making process.* |  | **O-P-C Question Examples:**  **Open:** Who else is involved in this decision?  **Probe:** Can anyone veto this decision?  **Confirm:** When can we meet with these people?  *Notes:* |

**Plan**

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| --- | --- | --- | --- | --- | --- |
| *Describe the steps/activities you need to see completed to close this opportunity. Include the activities the individual needs to see completed to become a client. Include post-signature steps leading up to the date that the individual expects to realize the value or results of your solution. Did you share this in writing, and have they accepted responsibility for certain steps?* | | | |  | **O-P-C Question Examples:**  **Open:** What do you need to see to be convinced we’re the right solution?  **Probe:** Do you need to see (an ROI analysis, demo, etc.)?  **Confirm:** Once we’ve completed these steps, will you be ready to move forward?  *Notes:* |
| 1. | *Enter task here.* |  | *Enter date here.* |  |
| 2. | *Enter task here.* |  | *Enter date here.* |  |
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| 6. | *Enter task here.* |  | *Enter date here.* |  |