**CONTACT**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| *Company:* |  | *Name:* |  | *Title:* |  | *Date:* |

**BUSINESS ISSUE**

|  |  |  |
| --- | --- | --- |
| Describe the initiatives that the customer is planning to accomplish, at a strategic level, to meet their business objectives of improving revenue, profits, and shareholder value |  | *Notes:* |

**ANXIETY QUESTION**

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| Anxiety question created? |  | **O-P-C Question Examples:**  What is the impact or ramification if they do not achieve their Business Issue at all? Or if not achieved on time? |

**Problem**

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| --- | --- | --- |
| * List your best understanding of the problems that prevent the customer from making progress on their business issues. * A combination of people, process and technology problems that make the Business Issue difficult to achieve, resolve * Please note if these have been confirmed or if the problems are assumed. |  | **O-P-C Question Examples:**  **Open:** What stands in the way of resolving or achieving the Business Issue?  **Probe:** Do you ever struggle with…?  **Confirm:** What I’m hearing is…? |
|  | *Notes:* |

**Solution**

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| --- | --- | --- |
| * List your best understanding of the solutions and capabilities that could be provided by us or a competitor that will enable the customer to address their problems and make an impact on their business issue. * This could also include solutions that the customer has requested that we cannot provide. * Please note our differentiators. * Confirmed in writing with the customer or assumed? |  | **O-P-C Question Examples:**  **Open:** What do you think would solve…?  **Probe:** Have you thought about…?  **Confirm:** Will these capabilities enable you to solve the Business Issue? |
|  | *Notes:* |

**VALUE**

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| --- | --- | --- |
| * Business Value: Describe how the customer will measure the quantifiable impact of our solution on their business issue in terms of business value. They should be expressed in terms a CFO would recognize: revenue improvement, operating expense reduction, inventory reduction, etc. * Data to anchor Value: examples included IT budget data by functional area, quantified Value/Size of the business initiative, mandated/committed metrics to Sr. Mgmt, IT org. headcount, Major purchasing decisions by Functional Area. |  | **O-P-C Question Examples:**  **Open:** How would you qualify the value?  **Probe:** Can you estimate the loss…?  **Confirm:** Do you see enough value to move forward with us?  *Notes:* |
| * Personal Value: Describe how the customer will measure the impact of our solution from a persona perspective. Examples: Will it help out their resume? Will they be viewed as a visionary? Will it allow them to get more visibility? |  |

**Power**

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| --- | --- | --- |
| * Describe the ultimate decision-maker * Describe the decision-making process for driving the order thru their organization. |  | **O-P-C Question Examples:**  **Open:** Who is involved in the decision?  **Probe:** Who has signing power? Can anyone veto this decision?  **Confirm:** When can we meet…?  *Notes:* |

**Plan**

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| --- | --- | --- | --- | --- | --- |
| * Describe the steps/activities completed plus those required for driving to closure of this opportunity. * Include the activities the prospect needs to see to be convinced to become a client. * Includes the strategic activities we need completed? * Is this mutual plan in writing? | | | |  | **O-P-C Question Examples:**  **Open:** What steps do you suggest?  **Probe:** ROI Analysis? Meet with all stakeholders?  **Confirm:** If this solves the issue, will you take action?  *Notes:* |
| 1. | *Enter task here.* |  | *Enter date here.* |  |
| 2. | *Enter task here.* |  | *Enter date here.* |  |
| 3. | *Enter task here.* |  | *Enter date here.* |  |
| 4. | *Enter task here.* |  | *Enter date here.* |  |
| 5. | *Enter task here.* |  | *Enter date here.* |  |
| 6. | *Enter task here.* |  | *Enter date here.* |  |

[*Click here*](http://www.valueselling.com/post-workshop/question-examples.docx) *for more open, probe and confirm question examples.*