
In there an installed vendor?

Yes No

Who _____

Is there a corporate-wide recommended vendor?

Yes No

Who _____

How long have they been the recommended vendor?

Have we sold any of their other operating divisions?

Yes No

Which ones/who?

If yes, can we leverage these relationships? How?

How is this decision being made? (Check all that apply)

- Steering Committee
- Short List
- Consultant
- RFP
- RFI
- Other

What other divisions are using the recommended vendor?

Current business pain with existing product or service or vendor?

What do we want to sell them?

What is the business dollar value the 1st year?

What is the business dollar value potential of this client over the next three years?

Do they have a stated budget?

Yes No

If so, how much _____

When do they want this product or service installed?

When do they want to be operational?

Why will they buy from us?

Why will we lose this deal?

How will we create value the prospect will believe?

Which contact(s) is/are making the decision?

Is a consultant involved?

Yes No

Name _____

Company _____

Telephone _____

Is the consultant:

For Us Against Us Neutral

What are the prospects' business consequences if they do not buy from us?

What does the selling team need to do, to close this business?

Do we need to get operational, engineering, finance or other departments involved in helping us sell this deal?

Yes No

If yes, which departments?

List any unusual marketing expenses needed to close this business:

Next actions steps:

Do we have a key account org chart of the decision team?

Yes No

Who will sign the contract?

Name _____ Title _____

Will the contract have to go to purchasing?

Yes No

Key Contract Signer Approach Strategies

Contract Decision Maker _____ Title _____

Key decision maker approach strategies

Contract Decision Maker _____ Title _____

Key decision maker approach strategies

Contract Decision Maker _____ Title _____

Key decision maker approach strategies

Contract Decision Maker _____ Title _____

Key decision maker approach strategies

Key decision maker's political environment

Return on Investment (ROI) expectations by decision makers

Return on Investment (ROI) calculation method for this sale

Are there any relationships with our existing customer base to this prospect?

Yes No

If Yes, Who?

Other information that is important about this sale
