Strategy Package
[ACCOUNT]

Company:

Address:

Primary Contact:

Contact Information:

Secondary Contact:

Contact Information:

Account Team Members	Principal Sponsor	Other Resources

Part 1

Getting Started

Team Vision - Picture of Success	
Effective research and pre-call planning definitively qualifies or disqualifies this prospect of the opportunity to do business with your company -or- Profitable Revenue Growth $ -or- $ Goal number and GM%	
Team Ground Rules	
Examples: • "Quick Meet" at least once a week • Assign weekly tasks	• Meet Milestone Goals • Share Strategy • Celebrate
Roles	
• Record-keeper: Updates notes/forms • Goal-tender: Facilitates completion of goals • Spokesperson: Reports out / Primary interface	

Milestone Goals

Date	Goal	Time Guide	Target Date
	Account Assessment / SWOT & Strategy Meeting		
	Customer Interest Prospect	30 Days	
	Initial Contact	60 Days	
	Qualify Customer Interest	90 Days	
	Review Initial Strategy		
	Meeting / Opportunity Analysis	Month 4	
	Solution Development	Month 5	
	Presentation and Justification	Month 6	
	Status Review		
	Customer Evaluation / Negotiation	Month 7	
	Commitment to Buy	Month 8	
	Follow-Up / Recycle	Month 9	
	After Action Review		

Communications Plan

Stakeholders	Objective	Content	Frequency	Responsibility
Development Team	Communicate Progress	Action Plan	Weekly	

Additional Resources Required

Part 2

SWOT Analysis (Strengths/Weaknesses/Opportunities/Threats)

A. Qualifying Information

1. Do we have contact with the General Manager or equivalent?	
2. Are they geographically dispersed?	
3. Multiple sites?	
4. Setting: (Type Of Business)	
5. >200 Employees.	
6. Qualifying Total (> 4 Pursue)	

B. Value and Time

1. Potential dollar value	
2. Estimated number of months to close	

C. Solution Type

1.	
2.	
3.	
4.	
5.	
6.	
7.	

D. Strengths / Weaknesses

1. Is there a recognizable need(s) that we clearly have the abilities to meet?	
2. Are the requirements within our core competencies?	
3. Is it clear who the decision-maker(s) for the opportunity is/are?	
4. Do we have a relationship with anyone in the organization?	
5. Do we have a relationship with an individual who can influence the organization?	
6. Does the physical location(s) fall within our most cost-effective geographical areas?	
7. Do Strengths outweigh Weaknesses? (1-6)	
8. What relevant resources do we have access to?	
9. What advantages do we have?	
10. What could we improve?	
11. What should we avoid?	
12. What annoys this customer most?	

Part 2

SWOT Analysis (Strengths/Weaknesses/Opportunities/Threats)

E. Opportunities / Threats

1. Will this project help establish a quality customer base?	
2. Does it open the door to a market that is a focus for us?	
3. Is there something unique about the prospective project that would aid our marketing efforts (newsworthy)?	
4. Can the contribution potential to the margin be acceptable?	
5. Are the required specifications for our job, products or services changing?	
6. Are there any unusual safety issues to be concerned about?	
7. Is the completion schedule realistic?	
8. Do Opportunities outweigh Threats? (1-8)	
9. What are the interesting trends we are aware of?	
10. What obstacles do we face?	
11. What is our competition doing?	
12. What are competitors doing that we don't?	
13. Where are we vulnerable to attacks from competitors?	
14. What could happen that would throw everything into a state of crisis?	
15. Where are any threats most likely to come from?	
16. What's the best way to respond and even capitalize upon any threats?	

F. Assessment

1. How does this opportunity stack up against other current opportunities?	
2. Can any Weaknesses and Threats be positioned as strengths and opportunities?	
3. Should this Opportunity be pursued?	

Incorporate unsatisfactory or blank answers in an Action Plan

Part 3

Account Assessment

Account Assessment General Observations

Areas of Opportunity (Lowest Scored Elements in Assessment)		Areas of Strength (Highest Scored Elements in Assessment)

<u>Opportunity Analysis</u>

Root Causes (Considerations)		Potential Solutions

Part 4

Crafting the Strategic Plan

A. Sales Opportunity

1.	Company Name:
2.	Role and Title of Primary Contact:
3.	Proposed Solution(s)

B. Source of Prospect

1.	What was the lead source?
2.	Is this a referral? From whom?

C. Needs and Objectives / Pain or Gain

1.	What is the prospect's specific need for the solution proposed?	
2.	Describe specific statements from the primary contact that define that need.	
3.	What objections are raised by the prospect?	
4.	What responses are used to overcome those objections?	
5.	What is the prospect's business goal or objective?	
6.	What is the primary contact's personal goal or objective?	
7.	What is the prospect currently doing?	
8.	Will the pain or opportunity cause them to buy at all? (Urgency)	
9.	Can we solve their problems profitably? (Linkage)	
10.	Can we solve it better than the competition? (Differentiation)	
11.	Can we provide strategic benefits? (Value)	
12.	Are requirements defined? By whom? (Politics)	
13.	Is there Dormant or Active Pain?	
14.	What's the Personal Agenda?	
15.	What's the Professional Agenda?	
16.	What's the answer to the "So what?" test?	
17.	Are there Strategic or Tactical Pains?	
18.	What are the Operational Benefits?	
19.	What are the Financial Benefits?	
20.	What are the Political Benefits?	
21.	What are the Strategic Benefits?	

D. Resource Allocation (Qualify)

1.	Is this good business for anyone?	
2.	Is this a winnable opportunity for US?	
3.	How does it compare to the rest of our opportunities?	

Crafting the Strategic Plan

E.

1. When did we arrive in the buying process?	
2. What criteria were established by the prospect for the selection process?	
3. How were these criteria determined?	
4. When did we last verify these criteria were still valid?	
5. Who's the incumbent?	
6. What competitors are involved?	
7. Can we win?	
8. How do we win?	
9. If each person had to vote today, would they recommend us?	
10. What are our differentiators?	
11. How would the competition defeat us?	
12. Positioning: Were we there first?	
13. Benefits: Mapping to personal and organizational needs	
14. Counter Strategy: How can a competitor defeat us?	
15. Controlling the Point of Entry: Do we have Executive Sponsorship?	
16. Which issues should we influence?	
17. How will we steer the process?	
18. Identify the influencers.	

F. Decision-Making Process

1. Who is the decision-maker?	
2. What is their title and role?	
3. Describe the decision-making process.	
4. Who else is involved in the decision-making process?	
5. What is the timeframe for the decision?	
6. What third-party influencers are involved?	
7. Do we have direct access to the decision-maker?	
8. Is the primary contact the decision-maker?	
9. How do they think they will decide? In whose opinion?	
10. How do we think they will decide?	
11. What part will each person play?	
12. When will they decide?	
13. What is the approval process?	

Part 4

Crafting the Strategic Plan

G.

1. Are there powerful people helping us?	
2. Whom do we need to be calling on to earn this business?	
3. Who influences them?	
4. Who else might become involved?	
5. Who is helping our competitors?	
6. Identify who has the power.	
7. Can we secure their support early?	
8. Can we build influence?	
9. Can we build a personal network inside?	
10. What are the common goals?	
11. Power Maps	

H.

1. What is the prospect's budget or desired price target?	
2. Is price raised as a significant issue? If so, when in the process?	
3. What price concessions, if any, will we offer to the prospect? When?	

I. Timeframe

1. What decision timeframe did the prospect provide at the beginning of the process?	
2. What is driving the timeframe?	
3. Did the timeframe change as we moved through the sales cycle?	
4. When did we last verify the decision-making timeframe?	

J. Referrals and Collateral

1. Which referral customers should we use, if any?	
2. How will we use those referrals?	
3. Which collateral materials will we use?	
4. What type of follow-up or support materials will we provide?	
5. What format should a proposal take? (Pictures, Diagrams, Graphs, Letter, Bullets, etc.)	

Part 4

Crafting the Strategic Plan

K. Warning Signals

1. Does the prospect hedge on when a decision will be made?	
2. Does the prospect hedge on the available budget or target price point?	
3. Does the primary contact reduce frequency of contact or become increasingly unavailable?	
4. Does the primary contact reduce our contact with others involved in the decision-making process?	
5. Does the decision-making process get changed?	
6. Does the prospect de-emphasize the need for the solution?	

L. Communicate the Strategic Plan

1. How do we plan to win?	
2. What do we sell to whom, where, when?	
3. Have we tested our plan?	
4. Do our tactics support our strategy?	
5. How could our plan fail?	

Incorporate unsatisfactory or blank answers in an Action Plan

Part 5

Sales Cycle Checklist

Sales Cycle Step	Activity
Step 1: Prospect Objective: • Identify establishments that could benefit from your services	• Pre-call planning • Research • Evaluate status of current accounts • Generate leads/prospects • Direct mail campaign • Develop territory contact plan • Identify and prioritize accounts for growth in all revenue streams • Analyze/prioritize leads • Do first call research
Step 2: Initial Contact Objective: • Establish rapport with client • Gather information about the client's strategic direction and business objectives	• Contact the account • Build rapport • Identify/validate key contacts and account information • Have a stated call purpose, then prepare customer call introductory statement and overview • Develop call strategy • Ask for consideration • Identify prospect's mission, vision and objectives • Raise contact to executive levels • Prepare executive presentation • Prepare customer correspondence
Step 3: Qualify Customer Interest Objective: • Gain an understanding of the client's organization • Decision-making guidelines / process and key business processes • Identify explicit client needs • Assess whether client can benefit from outsourcing offerings	• Understand customer's organization • Identify all decision-makers and influencers • Identify customer's business plan • Identify areas of opportunity • Identify customer business problems • Qualify customer's need • Demonstrate strategic concurrence • Identify opportunities in key business processes • Understand scope of opportunity • Identify competition • Determine budget, financial parameters and requirements • Gain customer commitment to next steps • Engage appropriate resources • Close for an appointment • Develop call strategy • Prepare customer follow-up correspondence
Step 4: Meeting / Opportunity Analysis Objective: • Identify and analyze client requirements and scope of opportunity • Validate results with potential decision-makers and gain pre-commitment	• Obtain samples of key customer applications/prospects documents • Conduct study • Document prospect financial • Pre-commit • Identify all possible product, support, services, strategies available to fulfill requirements • Be sure to obtain all the resources available at the time you need them • Uncover additional requirements; create needs

Part 5

Sales Cycle Checklist

Sales Cycle Step	Activity
Step 5: Solution Development Objective: • Identify potential solution to address client needs • Develop work plan Note: 88% of clients have made their decisions during step 5	• Determine which solutions are not appropriate • Select/design optimum solution • Demonstrate produce/services capability • Validate findings and potential solutions • Determine configuration • Determine implementation plan • Develop work plan • Prepare proposal • Identify and coordinate required resources • Review cost/benefit analysis and solution success criteria • Obtain required sign-offs • Review proposal to ensure all required solution elements are included • Examine alternative solutions • Define recommended solutions • Test against customer requirements • Provide input to implementation planning • Test solution against prospect requirements and benefits (value, complexity, longevity) • Contact all personnel involved in implementation of solutions
Step 6: Presentation Objective: • Show client how uniquely your solutions meet their requirements • Be Creative! • Differentiate from competition. Sell VALUE!	• Present proposal to decision-mater and key influencers • Negotiate proposal modifications • Uncover all objections and overcome/negotiate • Negotiate implementation plan • Review customer objectives and requirements • Review proposed solution and benefits to customer • Review financial and justification • Provide customer approved references
Step 7: Customer Evaluation Objective: • Confirm client agreement and buy-in, sign contract, and process for implementation	• Outlook order • Close the order • Negotiate proposal modifications • Confirm implementation plan • Reconfirm expected resource commitments • Process order • Understand prospect concerns • Detailed implementation plan refined • Gain agreement on contract
Step 8: Commitment to Buy Objective: • Ensure that all requirements of the implementation plan are met	• Share detailed implementation plan with appropriate resources • Establish implementation team • Detail implementation plan with dates and resources • Monitor implementation plan • Schedule regular calls to maintain customer relationship and satisfaction during implementation • Participate in obtaining customer sign-off on completed implementation, as required

Part 5

Sales Cycle Checklist

Sales Cycle Step	Activity
Step 9: Follow-up / Recycle Objective: • Evaluate and share results of partnership with client • Continuously improve relationship • Honor commitments to client • Promote continuous improvement	• Establish contact expectations • Monitor customer solutions • Adapt to meet changes in customer's business • Conduct periodic account reviews • Ensure customer delight • Continue relationship-building activities • Evaluate solution with customer using success criteria documented in proposal • Prepare customer for satisfactions survey • Manage customer expectations during problem resolution and follow-up to address any concerns • Agree with customer on schedule for follow-up calls • Execute detailed implementation plan • Implement retention plan. Contact strategy. • Uncover additional requirements • Update account profile • Implement retention plan • Focus on key business processes • Make follow-up call with customer as previously agreed • Develop account expansion plan • Expand relationship to other executives • Educate prospect • Develop opportunities for growth in all revenue streams

Part 6

Weekly Action Plan

Date Added	Priority	Action Items	Owner	Resources	Date Due	Status / Notes