

# Opportunity Conversion Process



<b>Opportunity Generators</b>	Sales History/Customer List Referral Sources/Alliances Networking Events/Business Events Market Intelligence		Suppliers Lists Industry lists Seminars/Speaking Engagements Active Marketing Efforts		Competitive Intelligence Trade Shows/Conferences Newsletter / E-Blast Leads Inbound Marketing Efforts	
<b>Suspects</b>	<b>Pre-Work</b>	<b>Milestones</b>	<b>Customer Buying Process</b>	<b>Targeted Outcome</b>	<b>Selling Tools</b>	<b>Marketing Support Tools</b>
<b>Prospect</b>	Identify Suspect Awareness Made Information Sent Action Plan Set Market Presence Credibility Capbility	Message Received Make the Call Contact Made Two Wat Conversation Qualify Target Or Disqualify Prospect	Not Looking Need Help Dont Know Looking at Trends Tracking Competition	Awareness Shown Interst Identify Target Qualify Target Say "Goodbye" Information Requested	Pref. Client Profile Success Stories Referrals Account Audit Form Request for Proposal	Website, Newsletter Social Media, Public Relations Email Signature, Thank You Card, Billing Reports/SBR Pitchbook/Cut Sheets Proposal/Contract Success Stories, Phone Scripts Sales/Customer Support
<b>Targets</b>	Warm Introduction Qualify "Target" as ideal. Pre-Seed Information Meeting Scheduled Action Plan Set	Handle Put-Ofs Identify Decsion Maker Measure Poential Give Reason to Meet Acknowledge the Problem Identify Buying Process Establish Timeline Qualify Opportunity -or- Disqualify Opportunity	Triggering Event Problem Surfaces Problem Studied Consequences Identified Worth Solving Looking for an Excuse Want to Learn More Look for Options Need Defined	Validate Opportunity Schedule a Meeting Identify another BANT Clear Next Step	Pref. Client Profile Value Proposition Comp Advantages Success Stories Referral Discovery Questions	Website, Newsletter Social Media, Public Relations Email Signature, Thank You Card, Billing Reports/SBR Pitchbook/Cut Sheets Proposal/Contract Success Stories, Phone Scripts Sales/Customer Support
<b>Discovery Meetings</b>	Background Infromation Meeting Scheduled Action Plan Set Know B.A.N.T. Resources Secured Team Commitment	Learn More about their business How do they make money? What do they do well? What to do better? Identify BANT Identify Need Qualify Opportunity Synergy Learn "Why"	Research option Establish Requirements Determine Credibility Determine Requirements Trust -Meet Team Determine ROI Assesing	Have a Solution Soft Close Develop solution Clear Next Step Identify BANT You Can Help! Team Introduced Evaluation Undertaken Trust Built Credibility Established Identify Stakeholders	Sales Call Anatomy Discover Questions Success Stories Account Audit Referral Cut Sheets Presentation Internal Resources	Website, Newsletter Social Media, Public Relations Email Signature, Thank You Card, Billing Reports/SBR Pitchbook/Cut Sheets Proposal/Contract Success Stories, Phone Scripts Sales/Customer Support
<b>Solutions</b>	BANT Identified Questions answered Know "how they buy" Consulted Internal Resources Opportunity Filter Action Plan Set Know Your Value	Timely Response Internal Support Buy-In Project Management Pricing/Terms Capacity in Place	Defined a Need Framing Expectations Exploring Options Reconfirm Requirements Developing Case Waiting for You Looking for Excuses Solve Themselves?	Win-Win Solution Objections Navigated Action Plan Clear Next Step Negotiation Acceptance of Terms Approval Submitted Soft Close Sunergy	RFP Format Contract Format Discovery questions Audit Results Opportunity Filter Referral Technical Expertise Internal Resources	Website, Newsletter Social Media, Public Relations Email Signature, Thank You Card, Billing Reports/SBR Pitchbook/Cut Sheets Proposal/Contract Success Stories, Phone Scripts Sales/Customer Support
<b>Proposals</b>	Solution Developed Decision Makers Present Meeting Scheduled Action Plan Set Internal Resrouces Add Value	Add Value to Business Handle Stalls Handle Questions Handle Objections Buy-In Soft Close ASK FOR THE ORDER	Evaluate Options in Detail Stakeholder Consensus Finalize Case Negotiate Purchase Making Excuses	Commitment for Business Clear Next step Action Plan PO Generated Resources in Place	Testimonial Answers from Questions Success stories Audit Results Referral Opportunity filter Technical Expertise Internal Resources	Website, Newsletter Social Media, Public Relations Email Signature, Thank You Card, Billing Reports/SBR Pitchbook/Cut Sheets Proposal/Contract Success Stories, Phone Scripts Sales/Customer Support
<b>Partnering</b>	Defined Offering Pre-Commitment Identify Win-Win Added Value Action Plan Set Internal Resources Set Contract Produced	Review Expections Finalize Terms Delivery Defined Payment Terms Agreed Purchase Order Produced Credit Approval Signed Contract	Finalize Terms Check References Confrim Decision Finalize Case Gain Approval Produce PO Expect Follow-Up Commitment	Soltuon Developed Decision Makers there Signed Contract PO Received Delivery Scheduled	Credit App Invoice Contract RFQ/RFP Success Stories Audit Results Referral Opportunity Filter Technical Expertise Internal Resources	Website, Newsletter Social Media, Public Relations Email Signature, Thank You Card, Billing Reports/SBR Pitchbook/Cut Sheets Proposal/Contract Success Stories, Phone Scripts Sales/Customer Support
<b>Post</b>	Delivery Utilization Paid as Agreed Strategic Business Review	Reinstate the Value Review Success Ask for Referral Testimonial Case Study Subject Additional Opportunities Market Intelligence	Implement Solution Realize Value Validate Decision Additional Solutions	Repeat Business Referral Additional Business	Review Scope Strategic Business Review Endorsements	Website, Newsletter Social Media, Public Relations Email Signature, Thank You Card, Billing Reports/SBR Pitchbook/Cut Sheets Proposal/Contract Success Stories, Phone Scripts Sales/Customer Support

Velocity

← Volume →

# Close = Goal / "Ideal Client" Avg. Value

Personal Goal = Target Revenue / Commission %