

Opportunity Plan

Account:

Sales

Opportunity:

Date:

Team:



Version 7.0

Target Account Selling Opportunity Plan

Customer's Business Profile	Describe the customer's business conditions. Include finance, revenue, profit and key performance indicators. Identify the customer's major lines of business, affiliations, products, and markets. Include information about recent mergers and acquisitions.		
REVENUE	PROFIT	FISCAL YEAR END	CORPORATE AFFILIATION

Opportunity Profile	Describe the customer's project or application. What are the customer's business objectives for the project? What is the total cost and/or budget for the project? How does the project affect the customer's overall business?		
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Compelling Event	What is driving the customer to make a decision or a change in the current situation? What is the payback if they make a change? What are the consequences if they do not act? What specific date is associated with the consequences/payback?		
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Opportunity Assessment

SALES OPPORTUNITY	ORDER AMOUNT	CLOSE DATE
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Write in the date and assess your position using + or -. If you don't know, put a question mark. Assess your competitor's position. Repeat at critical points in the sales campaign.

IS THERE AN OPPORTUNITY?			
1	CUSTOMER'S APPLICATION OR PROJECT	DEFINED	+
		UNDEFINED	-
2	CUSTOMER'S BUSINESS PROFILE	STRONG	+
		WEAK	-
3	CUSTOMER'S FINANCIAL CONDITION	STRONG	+
		WEAK	-
4	ACCESS TO FUNDS	YES	+
		NO	-
5	COMPELLING EVENT	DEFINED	+
		UNDEFINED	-
CAN WE COMPETE?			
6	FORMAL DECISION CRITERIA	DEFINED	+
		UNDEFINED	-
7	SOLUTION FIT	GOOD	+
		POOR	-
8	SALES RESOURCE REQUIREMENTS	LOW	+
		HIGH	-
9	CURRENT RELATIONSHIP	STRONG	+
		WEAK	-
10	UNIQUE BUSINESS VALUE	STRONG	+
		WEAK	-
CAN WE WIN?			
11	INDSIDE SUPPORT	STRONG	+
		WEAK	-
12	EXECUTIVE CREDIBILITY	STRONG	+
		WEAK	-
13	CULTURAL COMPATIBILITY	GOOD	+
		POOR	-
14	INFORMAL DECISION CRITERIA	DEFINED	+
		UNDEFINED	-
15	POLITICAL ALIGNMENT	STRONG	+
		WEAK	-
IS IT WORTH WINNING?			
16	SHORT-TERM REVENUE	HIGH	+
		LOW	-
17	FUTURE REVENUE	HIGH	+
		LOW	-
18	PROFITABILITY	HIGH	+
		LOW	-
19	DEGREE OF RISK	LOW	+
		HIGH	-
20	STRATEGIC VALUE	YES	+
		NO	-

DATE				
OUR CO.	COMPETITORS			

DATE				
OUR CO.	COMPETITORS			

DATE				
OUR CO.	COMPETITORS			

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Your Solution

Describe your solution. How will it work in the customer's environment? How does it meet their compelling event? Include any alliances or business partner solutions required to make it operational for the customer.

Unique Business Value

Define your unique business value with a value proposition that is specific to the customer, defines a measurable business result and creates credibility by proving your ability to deliver. Have you confirmed this with the customer? How does this differentiate you from your competitors?

Competitors

For each competitor describe their solution, including products, services, partners and price. Identify their alignment and their strengths and weaknesses. Determine their most likely strategy.

	COMPETITOR #1	COMPETITOR #2	COMPETITOR #3
Solution Proposed			
Alignment			
Strengths			
Weaknesses			
Anticipated Strategy			

Organization Map

STEP 1 – FORMAL STRUCTURE			
Map the customer's formal organization structure. Include everyone who affects or is affected by the decision. Go as wide and deep as possible. Complete steps 2–6 for each individual.			
STEP 2 – BUYING ROLE			
<input type="checkbox"/> A	APPROVER		
<input type="checkbox"/> D	DECISION MAKER		
<input type="checkbox"/> E	EVALUATOR		
<input type="checkbox"/> U	USER		
STEP 3 – ADAPTABILITY TO CHANGE			
<input type="checkbox"/> I	INNOVATOR		
<input type="checkbox"/> V	VISIONARY		
<input type="checkbox"/> P	PRAGMATIST		
<input type="checkbox"/> C	CONSERVATIVE		
<input type="checkbox"/> L	LAGGARD		
STEP 4 – YOUR STATUS			
<input type="checkbox"/> ★	MENTOR		
<input type="checkbox"/> +	SUPPORTER		
<input type="checkbox"/> =	NEUTRAL		
<input type="checkbox"/> -	NON-SUPPORTER		
<input type="checkbox"/> X	ENEMY		
STEP 5 – COVERAGE			
<input type="checkbox"/>	NO CONTACT		
<input type="checkbox"/>	BRIEF CONTACT		
<input type="checkbox"/>	MULTIPLE CONTACTS		
<input type="checkbox"/>	IN DEPTH		
STEP 6 – POLITICAL ANALYSIS			
<p>INNER CIRCLE POLITICAL STRUCTURE</p> <p>LINE OF INFLUENCE</p>			
EXAMPLE			
	John Smith VP of MANUFACTURING		
	D	V	+

Target Account Selling Opportunity Plan

Relationship Strategy	Who are the key people who affect the decision or who will be significantly affected by the decisions? Describe their business and personal agendas and the relationship strategy (Leverage, Motivate or Neutralize) you will use with each.		
Key Player	Business Agenda	Personal Agenda	Relationship Strategy

Our Strengths & Weaknesses	Identify all of your strengths and weaknesses. Focus on the business, organizational and political issues.	
Strengths	Weaknesses	

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Goal

Describe your desired, long-term position with the customer. Identify how a closer relationship with you will advance the attainment of their business goals. Also, include the long-term gain for your business, i.e., future revenue or strategic value.

Sales Objective

Describe your specific products and service. Identify the projected close date and total order amount.

Competitive Strategy

Review your strengths and weaknesses. Compare your position to the competition. Determine your strategy (frontal, flanking, fragment, develop or defend) and the variation that you will employ to win this opportunity.

Critical Success Factor

What has to happen for you to win this opportunity? Identify things the customer must do, things the competition must do, and things you must do.

Target Account Selling Opportunity Plan

Tactics

Prime
Tactics

Prove your value
Retrieve missing information
Insulate against competition

Minimize your weaknesses
Emphasize your strengths

Action	Resources Required	Responsibility	Timing

Target Account Selling Opportunity Plan

Tactics			
Prime Tactics		P rove your value R etrieve missing information I nsulate against competition	M inimize your weaknesses E mphasize your strengths
Action	Resources Required	Responsibility	Timing