

# 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?

### 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?

# Target Account Selling Opportunity Plan

## Opportunity Assessment

SALES OPPORTUNITY				ORDER AMOUNT				CLOSE DATE																																																																																																							
<p>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.</p>				<div style="border: 1px solid black; padding: 2px;">DATE</div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th style="width: 10%;">OUR CO.</th> <th colspan="3">COMPETITORS</th> </tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> </table>				OUR CO.	COMPETITORS																															<div style="border: 1px solid black; padding: 2px;">DATE</div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th style="width: 10%;">OUR CO.</th> <th colspan="3">COMPETITORS</th> </tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> </table>				OUR CO.	COMPETITORS																															<div style="border: 1px solid black; padding: 2px;">DATE</div> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th style="width: 10%;">OUR CO.</th> <th colspan="3">COMPETITORS</th> </tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> </table>				OUR CO.	COMPETITORS																														
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<b>IS THERE AN OPPORTUNITY?</b>																																																																																																															
1	CUSTOMER'S APPLICATION OR PROJECT	DEFINED	+	2	CUSTOMER'S BUSINESS PROFILE	STRONG	+	3	CUSTOMER'S FINANCIAL CONDITION	STRONG	+																																																																																																				
		UNDEFINED	-			WEAK	-			WEAK	-																																																																																																				
4	ACCESS TO FUNDS	YES	+	5	COMPELLING EVENT	DEFINED	+	6	FORMAL DECISION CRITERIA	DEFINED	+																																																																																																				
		NO	-			UNDEFINED	-			GOOD	+																																																																																																				
7	SOLUTION FIT	POOR	-	8	SALES RESOURCE REQUIREMENTS	LOW	+	9	CURRENT RELATIONSHIP	STRONG	+																																																																																																				
		HIGH	-			WEAK	-			STRONG	+																																																																																																				
10	UNIQUE BUSINESS VALUE	WEAK	-	11	INDSIDE SUPPORT	STRONG	+	12	EXECUTIVE CREDIBILITY	STRONG	+																																																																																																				
		STRONG	+			WEAK	-			GOOD	+																																																																																																				
13	CULTURAL COMPATIBILITY	POOR	-	14	INFORMAL DECISION CRITERIA	DEFINED	+	15	POLITICAL ALIGNMENT	STRONG	+																																																																																																				
		UNDEFINED	-			WEAK	-			HIGH	+																																																																																																				
16	SHORT-TERM REVENUE	LOW	-	17	FUTURE REVENUE	HIGH	+	18	PROFITABILITY	HIGH	+																																																																																																				
		STRONG	+			LOW	-			LOW	-																																																																																																				
19	DEGREE OF RISK	HIGH	-	20	STRATEGIC VALUE	YES	+	20	STRATEGIC VALUE	NO	-																																																																																																				
		WEAK	-			NO	-																																																																																																								

## Target Account Selling Opportunity Plan

## Decision Criteria

List all of the issues that will affect the customer's decision in the first column. Identify the most influential people in the first row. Rank order the importance of each issue for each person below their name.

[illegible]

## Milestones in the Buying Process

Identify completed and future steps in the customer's formal buying process. Include the evaluation activities as well as the approval, purchasing, legal and implementations steps.

[illegible]

# Target Account Selling Opportunity Plan

## 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>The diagram illustrates a political structure. It features an 'INNER CIRCLE' represented by a small square with a circle inside. A 'LINE OF INFLUENCE' is shown as a dashed line with arrows pointing from the inner circle to a larger, irregular shape representing the 'POLITICAL STRUCTURE'. The political structure is divided into two main sections, each containing a smaller square with a circle inside, connected by a dashed line.</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

## Target Account Selling Opportunity Plan

### 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

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

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