

## **Part 1 – Rapid Assessment Review**



### **1. Deal Desk Economics**

Company Name:	
Review Date:	
Sales Rep / SE / Partner Rep:	
Initial Deal Size Range: i.e. \$150 – 200k	
Number of years of support being sold?	
Expected Discount Level %:	
Expected Gross Margin %:	
Forecasted Close Date:	
Opportunity Number (in SFDC):	
Is Deal Desk approval required? Yes / NO	

1. What are we SELLING (Product and License Type; Perpetual, Subscription, Cloud)?
2. What Additional Revenue can we expect in the next 12 – 24 months?
3. If there is additional revenue, what is the Get-Well Plan to reduce future discounts / Improve Margins?
4. Are there any Special Terms and Conditions we might not like?

5. Has the Budget been approved?
6. Has the Budget been released?
7. Has anything changed in the customer's Approval process?

## The Relationship Map - Template

8. Are you speaking with the Decision Maker who has Final Authority to spend the budget?
9. Have you or your boss met them in Person?

10. What Needs and Business Outcomes will the solution address?
11. Is the solution Strategically Relevant, Tactically Urgent and provide Rapid Time to Value?
12. What is the Compelling Event that will ensure the deal closes as forecasted?
13. What happens if you miss the Compelling Event?

# The Relationship Map - Template

## Relationship Map

<b>Economic Decision Maker</b> Insert Name and Title Box 1   Box 2   Box 3		
<b>Technical Decision Maker</b> Insert Name and Title above ?   ?   ?		
<b>Technical Recommender</b> Insert Name and Title above ?   ?   ?		
<b>Inside Coach</b> Insert Name and Title above ?   ?   ?		
<b>Channel Partner</b> Insert Name and Title above ?   ?   ?		
<b>Alliance Partner</b> Insert Name and Title above ?   ?   ?		
<b>The "Fox" - Influencer *</b> Insert Name and Title above ?   ?   ?		

### Populate each Box

Box 1: Have you met the person Y or N

Box 2: Is the person: (+) Pro, (=) Neutral, (-) Against, (M) Mentor, (UNK) Unknown

Box 3: Is the person in the Power Base: (D) Decision Maker, (DI) Direct Influence, (I) Indirect Influence, (UNK) Unknown

### Minimum of 4 stakeholders

Must include:

- Economic Decision Maker (Edge \*\*)
- Technical Decision Maker or Recommender
- Coach (Edge \*\*)
- Channel and / or Alliance Partner
- Plus Fox, if there is one can change or influence the Decision Criteria

# WINNING THE SIX-FIGURE SALE

## Big Deal Roadmap

