

<b>Client Name:</b>	
<b>Market &amp; Sub-Market:</b>	
<b>Clients:</b> (types or named examples)	
<b>Industry Drivers:</b>	
<b>Financial Status:</b>	
<b>Goals &amp; Objectives:</b>	

**CURRENT SITUATION**

What is the client's Current Situation & Challenges?

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What is the Impact of their Current Situation & Challenges?

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What hidden challenges might there be?

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What might be the impact of those hidden challenges?

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Which risks are likely to be of greatest concern?

**ISSUES/CHALLENGES**

	Impact	Priority
What are the client's issues/challenges?		

## METRICS

*What metrics does the client use to measure their objective results? What are these results now? What do they want them to be? What is the value of the difference? What is the value over time?*

Metric	Current Value	Desired Value	Value of Difference	Value Over Time

## DECISION MAKING PROCESS

Who will be involved in the decision making process?

What process will they go through as they evaluate? Where are they at in that process now? What have they done to this point?

What is the time frame for a decision to be made? What are the drivers?

What criteria will they use to determine the ultimate solution? How will they make a decision?

What other solutions/alternatives are they or might they be considering?

## OPTIONS/RESOURCES/CONSTRAINTS

What other improvement opportunities may the client be unaware of?

Who on their team will be involved in implementing the project?

Has the client given any thought to a budget for the results they are seeking?

What has kept the client from solving this problem already?

## VALUE PROPOSITION / VALUE HYPOTHESIS

Why should this client see me now? What is my value hypothesis?

What tangible value can I bring to this client?

What are the metrics that measure the value I can bring?

What is the magnitude of the value I can bring?

What evidence do I have that I can help?

## POSITIONING

What strengths do I bring to this opportunity?

What might the client consider to be my vulnerabilities?

## QUESTIONS

	Priority
Information Questions: What additional information do I need?	
Value-Add Questions: What questions can I ask that will stimulate and facilitate my client's understanding?	

## ADDITIONAL RESEARCH

What additional research do I need to conduct before my meeting?

## SALES OBJECTIVE

What is my sales objective for this opportunity? (*Sales objectives should: 1. Be for a specific product/service, 2. Be Measureable (i.e. quantity), 3. Have a target date for completion, 4. Be realistic from client's perspective.*)

## BRING UNEXPECTED VALUE

What unexpected value can I bring to this meeting?