MEDDPICC+RR

Advanced Opportunity Qualification

for complex B2B sales environments

inflexion point

01

Why Bother Qualifying?

The quality and accuracy of opportunity qualification is widely acknowledged to be a key predictor of future sales success - and a critical differentiator between the best salespeople and the rest.

Today's top salespeople have too much respect for their own time to waste it on "opportunities" they have little or no chance of closing - while their less-effective colleagues often appear to hold on to dead or dying opportunities like a shipwrecked sailor clinging on to a piece of driftwood.

When we analyse relative sales performance, the benefits are obvious: the additional time and effort that top salespeople invest in qualification is more than repaid in terms of **shorter sales cycles**, greater **average deal values** and **higher win rates**.

Sales leaders that have implemented consistent opportunity qualification protocols see similar benefits across their entire sales organisation, together with **dramatically improved forecast accuracy**.

This practical guide - drawn from the experiences of some of today's most effective sales organisations - will show you how to implement a consistent, robust and scalable approach to opportunity qualification across your own sales organisation that will inevitably improve sales outcomes and bring confidence and consistency to your revenue forecasts.

A brief history of opportunity qualification

The earliest attempt to implement a disciplined approach to opportunity qualification in B2B sales environments was initiated by IBM, with their BANT (Budget, Authority, Need and Timeframe) approach.

BANT was subsequently adopted by a wide variety of sales organisations and is still in use in some more traditional sales environments today.

BANT focuses on four key questions:

- **Budget:** Does the prospect have a budget and if so, how much?
- **Authority:** Do we have access to the decision-maker?
- **Need:** Does the prospect have a clearly articulated business need?
- **Timeframe:** When does the prospect intend to implement a solution?

Whilst all significant sales opportunities are likely to satisfy all four tests at some point in their development, relying on BANT as the primary means of qualification has serious flaws in today's complex B2B buying environments.

BANT might appear to be an effective means of qualification for familiar, repeat purchases (for example when a customer is buying a new batch of raw materials) but it is far less effective when the customer is involved in an unfamiliar and often discretionary potential purchase that requires a significant amount of research.

The BANT parameters imply that salespeople should seek out formally defined, actively funded projects. But by the time a potential new project is fully "BANT qualified", the customer will already be a long way into their decision-making process. They will have already researched their options and have started to form their opinions.

BANT also assumes that there is a single decision-maker - but Gartner's research suggests that there are 5-10 or more significant stakeholders in the typical complex B2B buying journey. It's clear that a literal implementation of BANT is an over-simplistic approach to qualifying today's complex sales opportunities.

Given that other research by Forrester, Gartner and others proves that salespeople who engage early with the prospect and help to shape their thinking have a far greater chance of winning than salespeople that engage later, the idea of rejecting leads that are not fully BANT qualified is completely counterproductive.

The search for something better than BANT

BANT's obvious deficiencies have led many sales organisations to look for more effective approaches to sales opportunity qualification. Here are a few of the more common alternatives:

ANUM

Developed by Ken Krogue at InsideSales, ANUM proposes an evolutionary redefinition of BANT. ANUM stands for Authority, Need, Urgency and Money. It suggests that a salesperson needs to qualify opportunities based on the authority level of their contact, whether there is a clearly defined business need, the relative urgency of the problem, and whether money could be found if a business case can be made.

CHAMP

CHAMP is another evolutionary development of BANT. CHAMP stands for Challenges, Authority, Money and Prioritisation. It recognises that potential customers are most likely to change their behaviour is response to a business challenge and redefines the apparent lack of initial Authority as a call to action, rather than a roadblock - encouraging the salesperson to navigate their way through the prospect's organisation.

FAINT

The RAIN Group advocates using FAINT, which stands for Funds, Authority, Interest, Need and Timing. Like ANUM, FAINT looks for situations where the organisation has the capacity and motivation to buy, rather than whether a budget has already been allocated. The "interest" factor relates to the potential buyer's level of curiosity in exploring the possibilities and in achieving a better future outcome.

ANUM, CHAMP and FAINT all offer useful advantages over a purist application of BANT, but they still also tend to paint over-simplistic pictures of the complexities of modern B2B buying journeys.

This is why a growing number of sales leaders now regard MEDDIC and its variants as a more effective means qualifying complex, high-value B2B sales opportunities...

Enter MEDDIC

MEDDIC was pioneered by Jack Napoli at PTC, and - together with its evolutionary variants - has emerged as the preferred approach to opportunity qualification for technology-based businesses, particularly where companies are selling high-value solutions that involve complex buying journeys and which have the potential to drive transformational changes in the customer's organisation.

The original six MEDDIC qualification criteria were Metrics, Economic Buyer, Decision Criteria, Decision Process, Identify Pain and Champion. When taken together these represented a step-function improvement in identifying the key factors that enable salespeople and their managers to accurately assess the quality of their sales opportunities:

- **Metrics** are the specific measurable business outcomes your customer requires the project to deliver
- **Economic Buyer** is the person or group with final decision authority over whether and how the project goes ahead
- **Decision Criteria** are the criteria that the customer will use to decide between their potential solution options
- **Decision Process** is the process and timetable the customer will follow when deciding which option to choose, and who will be involved
- **Identify Pain** is the customer's current or anticipated pain that will cause them to take urgent action
- **Champion** is about whether you have a powerful and enthusiastic champion within the organisation

If any of these six factors are unknown or a weak fit, the salesperson's chances of winning the opportunity will be significantly reduced. Any one of these factors, depending on the circumstances, can cause a red flag to be raised. Multiple weaknesses, unless they can be resolved, should generally result in the opportunity being disqualified.

The adoption of MEDDIC represented a significant advance over the various flavours and variations of BANT, but perhaps inevitably its success spawned a number of evolutionary variants - and in particular MEDDICC and MEDDPICC, both of which added important additional considerations that add further precision to the qualification process in complex B2B sales environments.

Beyond MEDDIC

To date, the two most widely deployed variants of MEDDIC have been MEDDICC and MEDDPICC.

MEDDIC**C**

MEDDICC introduced a seventh qualification factor - **competition**. Most large projects are contested between a number of different potential suppliers, and it's important that salespeople not only identify these other options, but also understand their relative position against them.

MEDD**P**ICC

MEDDPICC introduced yet another valuable qualification factor when dealing with large and complex opportunities - the customer's "**paper process**". This involves understanding the contractual, legal, approval and vendor onboarding processes the customer needs to complete before an order can be placed.

The latest iteration - MEDDPICC+RR

Both of these factors represented a further refinement in the qualification of complex B2B sales opportunities. But after a careful analysis of the common factors behind unexpected deferrals or losses, we found that two additional criteria were also often at play - and that ignoring them tended to reduce qualification accuracy in a number of important circumstances:

- **Relative Priority**: In the early stages of an opportunity, competition tends to come from the other solution options being considered, but in the later stages of an opportunity, the "competition" comes from a completely different source - the other projects that are competing for funds and attention

- **Risk Factors**: The final criteria involves risk factors that could affect the customer's decision process. These can be either internal - for example, changes in the decision team or the customer's priorities, or they could be external factors - the most obvious recent example being the impact of Covid-19

We prefer the completeness of MEDDPICC+RR, but we recognise that some clients - and some opportunities - may not need to apply all 10 factors. We designed Inflexion-Point's MEDDPICC+RR opportunity qualification framework to allow this flexibility, whilst ensuring that all similar opportunities are qualified in the same consistent way.

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Key Principles

Regardless of which qualification methodology you choose to apply in your sales organisation, four key principles need to be applied:

First, opportunity qualification must be managed as a continuous process rather than a one-off event.

Second, similar types of opportunities must be qualified according to the same consistent rules.

Third, salespeople need to be completely honest with themselves and with their managers when assessing the status of every opportunity.

Fourth, and closely related to the previous principle, salespeople must avoid making unverified assumptions about any of the qualification criteria

Let’s explore each of these in more detail...

Qualification is a continuous process

In complex B2B sales environments opportunity qualification must be managed as a continuous process, for a number of reasons:

- It is usually impossible to completely and accurately qualify any complex opportunity in a single session
- Some aspects of the qualification criteria are likely to be initially unknown to the salesperson
- It is highly likely that some aspects of the customer's circumstances will change during the course of a lengthy buying journey
- The initial assessment of a number of the qualification factors will probably need to be verified through further investigation or dialogue

We strongly recommend that every active opportunity is requalified regularly, and in particular prior to advancing to the next stage of the pipeline or whenever circumstances change.

Qualification must be consistent

Whilst there is often a case to be made for different opportunity types to be qualified against more or fewer parameters - for example, the qualification of a large net new opportunity with an organisation that is not currently a customer usually needs to be more rigorous than that of a relatively small upgrade to an existing project with an existing customer - but every opportunity of the same type must be qualified to the same consistent standard.

This also means that every salesperson must qualify every opportunity of a given type in the same consistent way as every other member of the sales team - using the same parameters, applying the same standards, and with the same rigour.

Honesty is paramount

Salespeople need to be brutally honest with both themselves and their managers when qualifying sales opportunities. There's no point in fooling themselves or anyone else - any attempt to "gloss over the cracks" or to ignore evidence of the true status of an opportunity will inevitably come back to haunt them.

Assumptions kill opportunities

Unverified assumptions create unjustifiably positive projections about the chances of success, and they blindside the salesperson into believing they are doing well when they are not. They prevent salespeople from uncovering issues that - if acknowledged - could have been dealt with before they did serious harm.

By the time the false assumption has been uncovered, it's often too late to do anything about it. The golden rule is "if you don't know, don't guess". It is far better to acknowledge and admit that a qualification factor is currently unknown or uncertain than to make a dangerous and unjustified assumption.

Principles + process = effective qualification

If it is to be effective, sales opportunity qualification must be continuous, consistent, honest and free from assumptions, and it must be implemented as a well-defined and universally adopted process.

Whether your organisation chooses one of the successors to BANT or one of the variations on MEDDIC, it is vital that every salesperson recognises their responsibilities to follow the guidelines and qualify every opportunity as accurately as they can.

In fact, we'd go further: accurate qualification is so important to the interests of the organisation that any persistent failure to embrace both the principle and the process, if it cannot be remedied through coaching, should result in disciplinary action.

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Introducing MEDDPICC+RR

If - like most of Inflexion-Point's clients - your sales organisation is typically involved in lengthy and complex B2B buying journeys, we recommend that you implement MEDDPICC+RR for all significant new business opportunities.

The remainder of this document offers a detailed guide to putting the full version of MEDDPICC+RR into practice.

If, on reflection, you conclude that some of the criteria are less significant when qualifying other opportunity types - for example expanding your presence in an existing customer - we recommend that you implement a cut-down version of MEDDPICC+RR for that all opportunities of that type...

The MEDDPICC+RR Criteria

MEDDPICC+RR is the most comprehensive implementation of the MEDDIC principles, extending it to include evidence-based assessments of your competition, your customer's approval process, the project's relative priority and any relevant risk factors - all criteria that are often crucial to the accurate qualification of significant new business opportunities.

Later in this section, we'll offer a detailed description of each MEDDPICC+RR criteria but in the meantime, here are the summary definitions:

M=Metrics: What are the specific measurable business outcomes your customer requires the project to deliver?

E=Economic Buyer: Who is the person or group with final decision authority over whether and how the project goes ahead?

D^1=Decision Criteria: What are the criteria that the customer will use to decide between their potential solution options?

D^2=Decision Process: What is the process and timetable the customer will follow when deciding which option to choose, and who will be involved?

P=Approval Process: What is the process the customer will follow when deciding whether or not to go ahead with the project?

I=Intensity of Pain: Is the customer's current or anticipated pain intense enough to ensure that they will take urgent action?

C^1=Champion: Do you have a clear and enthusiastic champion, and are they powerful enough to persuade the other stakeholders?

C^2=Competition: What are their credible alternative solution options, and how do you compare against them?

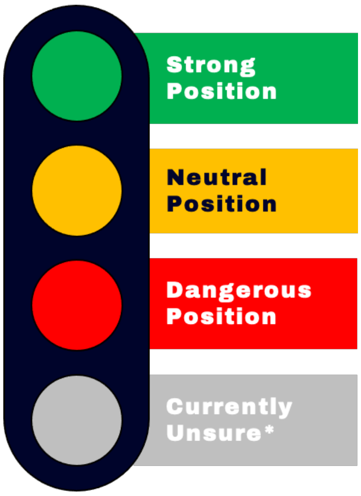
R^1=Relative Priority: What is the relative importance of this project when compared to their other active potential initiatives?

R^2=Risk Factors: Are there any other obvious risk factors that may affect the timing or outcome of their decision?

You'll probably notice that these definitions recognise that it is as important to qualify whether the project will go ahead as it is to qualify whether, if it does, you can win.

A traffic light approach

We recommend adopting a “traffic light” approach when it comes to assessing whether you are in a strong, neutral or dangerous position or are currently unsure about each qualification criteria according to clearly defined, evidence-based definitions:



As far as this factor is concerned, according to the available evidence, you are in a **strong** position

As far as this factor is concerned, according to the available evidence, you are in a **neutral** position

As far as this factor is concerned, according to the available evidence, you are in a **dangerous** position

You do **not yet know enough** to make an evidence-based judgement

The default starting position for each qualification factor is “unsure” and it must remain in this state until and unless the salesperson has clear evidence for changing the status. If any factor remains “unsure” at an advanced stage of the opportunity, this uncertainty may of itself amount to a red flag.

Depending on the nature of the project, a single “dangerous” factor may be enough to disqualify the entire opportunity.

Late-stage opportunities that still have large numbers of “unsure” or any “dangerous” factors must be subjected to particularly close scrutiny.

Assess and justify

We strongly recommend that you require salespeople to implement an **assess and justify** strategy: if the salesperson assesses any of the factors as anything other than “unsure”, they must be prepared - and in most circumstances should be required - to justify and document the reasons behind their conclusion.

Matching criteria to opportunity type

As we've acknowledged, not all of these MEDDPICC+RR criteria may be relevant to qualifying each type of opportunity - particularly the smaller, simpler or easier opportunity types. It may make sense to systematically exclude one or more of the criteria for these types.

Progressive qualifying

It should also be obvious that it is very unlikely that all the qualifying factors will be obvious from the earliest interaction with the customer, and that some may only be capable of being assessed as the customer moves through their buying journey, but there are other factors where an initial judgement can and should be made - even if it is revised later, for example:

Customer phase = Exploring

While the customer is still in the initial exploring phase, the salesperson must attempt to make initial judgements regarding the **intensity of the customer's pain**, whether your initial contact appears to be a potential **champion**, and the **relative priority** of the project.

Customer phase = Defining

In addition to requalifying the factors above, once the customer advances to the defining phase, the salesperson must also attempt to identify their potential **competition**, the **economic buyer**, establish the customer's **decision criteria** and **decision process** and determine whether they have a potential internal **champion**.

Customer phase = Selecting

In addition to requalifying all the above factors, the salesperson must also attempt to understand the customer's **approval process** and identify any potential **risk factors**.

Customer phase = Verifying and Confirming

Towards the end of the buying cycle, in addition to being alert to any changes in the customer's circumstances, the salesperson must pay particular attention to the customer's **approval process**, the **relative priority** of the project, and any new or existing **risk factors**.

One more thing: close date confidence

Whilst not strictly a qualification factor, there is one more question that sales leaders need to ask their salespeople when evaluating the quality of each sales opportunity: "**where did that close date come from - and is it still accurate?**"

Every CRM system requires the salesperson to enter a close date when creating a new sales opportunity, but very few CRM implementations require the salesperson to explain or justify where the date came from or require them to regularly revalidate it.

This is a **potentially damaging blind spot**.

In many cases, the salesperson will simply have plucked the close date out of thin air - almost always aligned to the end of the month or quarter, despite the fact that customers that are embarked on complex buying journeys rarely place orders in that sort of regimented fashion.

We strongly recommend that you add an additional mandatory close date "**traffic light**" field and an associated explanation field to your CRM, and that you require your salespeople to declare whether:

- **Customer Must [GREEN]**: the date is based on an acknowledged compelling event which will force the customer to place an order by or before this date
- **Customer Wants [AMBER]**: the customer has confirmed that they would like to place an order by this date, but it is possible that the date could slip
- **Salesperson Hopes [RED]**: in the absence of any discussion with the customer on the subject, this is when the salesperson hopes to close the sale

Every new opportunity should default to "salesperson hopes" and should remain there until and unless the salesperson can confidently declare that the customer either must or wants to place an order by the recorded close date and the salesperson can summarise their reasons for believing this in the associated explanation field.

Salespeople should update these close-date-related fields whenever circumstances change or new information becomes available, whenever the close date is past due, and whenever an opportunity is about to be promoted from on pipeline stage to the next.

04
MEDDPICC+RR in Detail

This section contains detailed guidelines for evaluating each of the 10 MEDDPICC+RR qualification factors.

You may find it helpful to add further guidance that reflects any unique considerations that relate to your own specific business environment...

M=Metrics

Definition: What are the specific measurable business outcomes your customer requires the project to deliver?

Explanation: These metrics are typically associated with significant improvements in business performance, such as increasing revenues, reducing costs, saving time, increasing productivity and/or measurably improving the organisation's market share.

Why this is important: If the projected business outcomes are either unclear or insufficiently significant, the project is unlikely to be approved.

Strong Position	Neutral Position	Dangerous Position
They have clear expected outcomes which fully justify their decision to invest in the project	The expected business outcomes from the project, whilst positive, are not overwhelming	The expected outcomes from their project are neither clear nor strong enough to ensure they take action

How to assess this factor:

- Is there a sufficiently strong gap between their current situation and the better outcomes they are looking for?
- Are they fully aware of the costs and consequences of sticking with the status quo?
- Do they have a clear sense of the future metrics they want to achieve?
- Is the whole stakeholder group fully behind the need for change?
- Are the metrics strong enough to support the business case?

Key considerations:

What impact do your products or services have on your customer's business performance, and which of these metrics are most likely to influence their decision to take action?

If you cannot make an evidence-based judgement about the key metrics underpinning the opportunity, you must not guess or make assumptions, but categorise this factor as "unsure".

E=Economic Buyer

Definition: Who is the person or group with final decision authority over whether and how the project goes ahead?

Explanation: These economic buyers are typically senior executives with the power to establish priorities, reallocate budgets and either approve or reject internal project proposals. Depending on the size of the organisation, they are likely to be at the C- or Senior VP- Levels, and they can be approval groups (e.g., the board of directors) rather than individuals.

Why this is important: If you are unable to access or influence the approver(s), your chances of winning are dramatically reduced.

Strong Position	Neutral Position	Dangerous Position
You are directly and positively engaged with the customer's final decision authority	You have identified the customer's final decision authority but have not directly engaged them	You have not been able to identify or engage with the customer's final decision authority

How to assess this factor:

- Is your current contact obviously the economic buyer or primary project sponsor?

If not,

- Are they aware of who the economic buyer is?
- Do they appear to have a good relationship with the economic buyer?
- Are they willing and able to introduce you to the economic buyer?

Key considerations:

How do decisions typically get final approval in your customers? Which roles tend to get involved? Is it typically a single individual or an approval group? What titles or responsibilities do they hold?

If you cannot make an evidence-based judgement when it comes to the identity of the economic buyer(s), you must not guess or make assumptions, but categorise this factor as “unsure”.

D^1=Decision Criteria

Definition: What are the criteria that the customer will use to decide between their potential solution options?

Explanation: Your customer's decision criteria often includes but is rarely restricted to the functionality of competing products or services. They will often take into account each vendor's market position and reputation and will reflect their confidence that the expected business outcomes will be achieved. They will often include both formal and informal criteria - such as how they feel about each potential option.

Why this is important: You must both understand and influence their decision criteria to have any significant chance of winning.

Strong Position	Neutral Position	Dangerous Position
You have influenced the customer's decision criteria and they are clearly favourable to you	You understand the customer's decision criteria and you are well placed to satisfy them	You either have no idea about their decision criteria, or they are clearly unfavourable

How to assess this factor:

- Has your prospect shared their decision criteria with you?
- Are these criteria favourable, neutral or unfavourable?
- Do you understand the relative importance of these criteria?
- Have you been able to influence these criteria and if so, to what extent?
- If they are going to issue an RFP, how much have you been able to influence the contents?

Key considerations:

Without an accurate understanding of their decision criteria (both formal and informal), it will be difficult to present your offering in the best possible light. It is important to try to engage the customer early and to influence their decision criteria in your favour - salespeople who successful engage and influence the customer prior to these criteria being formalised stand a far better chance of winning the customer's business.

If you cannot make an evidence-based judgement about the customer's decision criteria, you must not guess or make assumptions, but categorise this factor as "unsure".

D^2=Decision Process

Definition: What is the process and timetable the customer will follow when deciding which option to choose, and who will be involved?

Explanation: In some situations - particularly in the public sector - the customer will be implementing a formally published RFP process, including defined milestones and timescales. At the other end of the scale, the customer’s “process” may be poorly defined, opaque, have no obvious timeframe and be unlikely to result in a decision. If this is the case, you must take steps to help them manage the decision process more effectively.

Why this is important: You need to understand how they will decide and who will be involved to have a significant chance of winning.

Strong Position	Neutral Position	Dangerous Position
You have a clear and complete understanding of the customer's decision process and timetable	You have a partial and incomplete understanding of the customer's decision process and timetable	You have no idea about their decision process or timetable, or it operates to your disadvantage

How to assess this factor:

- Do they appear to have any form of structured decision process or timetable?
- Has your prospect shared their decision process or timetable with you?
- Do you understand who will be involved, and what role they will play?
- To what extent have you been able to influence their decision process?
- Does their decision timetable seem to be realistic, credible and achievable?
- Is their decision process favourable, neutral or unfavourable?

Key considerations:

If your customer has a rigidly defined decision process, and in particular if they have issued an RFP, you must make sure that you comply with their required approach whilst at the same time finding ways of showing how and why you are different. If their process is clearly biased against you, you should carefully consider whether it is worth continuing. And if their process is poorly defined or managed, you must find ways to help them manage the process more effectively. If you cannot make an evidence-based judgement as to what the customer’s decision process is, you must not guess or make assumptions, but categorise this factor as “unsure”.

P=Approval Process

Definition: What is the process the customer will follow when deciding whether or not to go ahead with the project?

Explanation: This is known as the "paper process" in some other versions of MEDDPICC. It represents all the other things the customer needs to do before a project can be approved and an order issued to the successful vendor. This typically includes legal and commercial negotiations, and often includes a technical evaluation to ensure that any new systems satisfy the organisation's IT and security standards. A new vendor may also need to go through a vendor approval and onboarding process before an order can be generated.

Why this is important: You need to understand what they need to do to negotiate, verify and approve the final decision.

Strong Position	Neutral Position	Dangerous Position
You have a clear and complete understanding of the customer's final approval process	You have a partial and incomplete understanding of the customer's final approval process	You have no idea about their approval process, or it operates to your disadvantage

How to assess this factor:

- Do you understand what needs to happen for the project to be approved, and the timeframe?
- What role will legal and procurement play, and who will be involved?
- Who else will be involved, and what criteria will they apply?
- What needs to happen to establish you as an approved vendor?
- What is their process for issuing an order?

Key considerations:

Unexpected late stage delays in closing what appears to have been a well-qualified opportunity can often be attributed to a failure to fully understand or facilitate the customer's final approval processes. Your internal sponsor - if they are not experienced buyers - may be unaware of all the details. It is your responsibility to find out exactly how the approval process works. If you cannot make an evidence-based judgement as to what your customer's approval process is, you must not guess or make assumptions, but categorise this factor as "unsure".

I=Intensity of Pain

Definition: Is the customer's current or anticipated pain intense enough to ensure that they will take urgent action?

Explanation: Behavioural science tells us that people and organisations are 2-3 times more likely to commit to change to avoid or eliminate pain than they are to invest in the hope of a future gain. Salespeople need to identify the customer's sources of pain, and understand who is affected by the pain, and how.

Why this is important: If the cost and consequences of inaction are not sufficiently high, and if the pain is not regarded as serious, the customer is likely to stick with the status quo.

Strong Position	Neutral Position	Dangerous Position
The pain is so obviously severe that they cannot afford to stick with the status quo	The pain is significant but not unbearable, and the customer may be able to live with it	The customer has not acknowledged any significant costs or consequences of inaction

How to assess this factor:

- Does the customer appear to be suffering from significant current or anticipated pain?
- Are they able to identify significant costs and consequences of inaction?
- Do they convey a sense of urgency?
- Is there an obvious compelling event?
- Is the pain increasing progressively over time?

Key considerations:

It's not enough to simply understand the customer's current pains. They need to intensify the pain by amplifying the costs, consequences and implications of the pain, and do all they can to introduce additional sources of pain. No significant pain = no change.

If you cannot make an evidence-based judgement as to the actual intensity of your customer's pain, you must not guess or make assumptions, but categorise this factor as "unsure".

C^1=Champion

Definition: Do you have a clear and enthusiastic champion, and are they powerful enough to persuade the other stakeholders?

Explanation: Most sales methodologies encourage salespeople to identify an internal coach or champion within the customer. But their enthusiasm isn't enough. Champions also need to be respected by all the other stakeholders and be capable of influencing their thinking. This means that the most effective champions tend to be highly placed business executives with responsibility for addressing the identified business issues.

Why this is important: If you do not have a powerful and influential champion, you will struggle to emerge as the winning option.

Strong Position	Neutral Position	Dangerous Position
You have a powerful, influential and active internal champion promoting your solution	You have an enthusiastic champion, but they do not appear to be very influential with other stakeholders	You have not been able to identify or develop any enthusiastic internal champions

How to assess this factor:

- Have you found an enthusiastic internal champion?
- Do they appear to have influence over their colleagues?
- Are they capable of making the case for the project as well as for your solution?
- Do any of the other competitive options also have champions?
- If so, how powerful and influential are they?

Key considerations:

Is the person you are hoping to rely on as a potential internal champion appear to be sufficiently powerful, politically astute and influential enough to be able to promote both the project itself and your proposed approach as the most attractive option?

If you cannot make an evidence-based judgement as whether or not you have actually engaged a powerful champion, you must not guess or make assumptions, but categorise this factor as "unsure".

C^2=Competition

Definition: What are their credible alternative solution options, and how do you compare against them?

Explanation: Your competition includes all the other credible options your customer may be seriously considering - not just other similar vendors. You need to identify all these options and understand how to position yourself against them in terms that are relevant and meaningful to the customer.

Why this is important: You need to clearly and distinctively stand out from all their other credible solution options.

Strong Position	Neutral Position	Dangerous Position
The customer confirms that you have important advantages over other potential options	The customer sees you as being no more or less competent than their other solution options	At least one of their other options appears to have significant advantages over you

How to assess this factor:

- Do you know what other options they are considering?
- Do you know what they think of you in comparison to these other options?
- How well do you believe you can compete against these other options?
- Do they have any obvious significant advantages?
- Do you have any obvious significant advantages?

Key considerations:

Your opinion of the competition does not matter - in fact, it can be dangerous if you underestimate them. The only thing that matters is the customer's perception of your relative strengths, weaknesses, advantages and disadvantages - and of your relative credibility as potential partners.

If you cannot make an evidence-based judgement as to what your actually customer thinks, you must not guess or make assumptions, but categorise this factor as "unsure".

R[1]=Relative Priority

Definition: What is the relative importance of this project when compared to their other active potential initiatives?

Explanation: Most traditional opportunity qualification methodologies (including other versions of MEDICC/MEDPICC) fail to recognise the importance of competing projects when it comes to winning the customer's final approval.

Why this is important: Even if you win the customer's recommendation, you will often still find yourself competing against other projects for funding.

Strong Position	Neutral Position	Dangerous Position
This project is at or close to the top of the customer's short-term investment priority list	The project is seen to be important but is not regarded as a top "must do" priority	The project is not regarded as being a particularly high priority, and they could live without it

How to assess this factor:

- Do you know what other projects are competing for investment at this time?
- Do you know how your project stands against these other projects?
- What is the relative importance of your project?
- Does your project have a powerful executive champion?
- Do the other potential projects have powerful executive champions?

Key considerations:

Every organisation has many more potential projects than they can afford to invest in at any one time, so they are forced to prioritise. Even if you have been selected and have agreed contractual and commercial terms, you may still not get approved if another project is seen to be more important or urgent.

If you are unaware of whether your project is competing against other projects for short-term investment, you must not guess or make assumptions, but categorise this factor as "unsure".

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R^2=Risk Factors

Definition: Are there any other obvious risk factors that may affect the timing or outcome of their decision?

Explanation: It is in the nature of most salespeople to ignore or underplay potential risks to winning the deal. These risks can include changes in the customer's internal or external circumstances such as new executive appointments, changes in the stakeholder group, the loss of a potential champion, new company initiatives, revised priorities, competitive activity or other external market forces.

Why this is important: Every project has risk factors: you must ensure that you proactively identify and address the significant ones.

Strong Position	Neutral Position	Dangerous Position
There are no significant unaddressed risk factors that could affect their decision	There are some potential risk factors, but you have a clear and credible plan to address them	There is at least one significant risk factor you can do absolutely nothing about

How to assess this factor:

- What could go wrong?
- What are the risks to your winning their recommendation?
- What are the risks to your getting final approval?
- What have you done to mitigate these risks?
- Are there any external factors that could affect the deal?

Key considerations:

Every project, and every sales strategy, involves risk. It is particularly dangerous to assume that nothing has changed since the opportunity was first qualified. Salespeople must always be on the alert for "what could go wrong" and take proactive steps to mitigate any impact.

If you are unaware of whether there are any obvious risk factors, you must not guess or make assumptions, but categorise this factor as "unsure".

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Putting these principles into practice

Finally, we would like to offer some simple guidelines for putting MEDDPICC+RR into practice in your own sales organisation...

Implementing MEDDPICC+RR in your organisation

Whichever opportunity qualification methodology you decide to implement, it must be consistently applied and embedded into the fabric of how your salespeople manage sales opportunities - and MEDDPICC+RR is no different.

For most organisation, this means integrating the methodology into the opportunity management module of your CRM. An initial integration might simply involve adopting our MEDDPICC+RR qualification spreadsheet and attaching a copy to every opportunity, and this can certainly be effective as a short-term stop gap measure.

Clients of Inflexion-Point's Outcome-Centric Selling® system have access to our easy-to-use spreadsheet-based MEDDPICC+RR opportunity qualification worksheet and associated training materials.

Outcome-Centric Selling® | MEDDPICC+RR Opportunity Qualification Worksheet

Organisation					Opportunity	Score
						0
	Factor		Status	Definition	Justification/evidence	
M	Key Metrics	What are the specific measurable outcomes your customer needs the project to deliver?	Unknown	You do not yet know enough to confidently qualify this factor		0
E	Economic Buyer	Who is the person or group with final decision authority over whether and how the project goes ahead?	Unknown	You do not yet know enough to confidently qualify this factor		0
D	Decision Criteria	What are the criteria that the customer will use to decide between their potential solution options?	Unknown	You do not yet know enough to confidently qualify this factor		0
D	Decision Process	What is the process the customer will follow when deciding which option to choose?	Unknown	You do not yet know enough to confidently qualify this factor		0
P	Approval Process	What is the process the customer will follow when deciding whether or not to go ahead with the project?	Unknown	You do not yet know enough to confidently qualify this factor		0
I	Intensity of Pain	Is the customer's current or anticipated pain intense enough to ensure that they will take urgent action?	Unknown	You do not yet know enough to confidently qualify this factor		0
C	Champion	Do you have a clear and enthusiastic champion, and are they powerful enough to persuade other stakeholders?	Unknown	You do not yet know enough to confidently qualify this factor		0
C	Competition	What are their credible alternative solution options, and how do you compare against them?	Unknown	You do not yet know enough to confidently qualify this factor		0
R	Relative Priority	What is the relative importance of this project when compared to their other potential active initiatives?	Unknown	You do not yet know enough to confidently qualify this factor		0
R	Risk Factors	Are their any other obvious risk factors that may affect the timing or outcome of their decision?	Unknown	You do not yet know enough to confidently qualify this factor		0

But a more effective long-term approach is to create MEDDPICC+RR custom fields in the CRM opportunity management module, since this will offer greater visibility and allow direct reporting and analysis. Most serious B2B-focused CRM systems are capable of this sort of customisation.

Pre-customised approach

We also offer a pre-customised version of MEDDPICC+RR as part of the Outcome-Centric Selling® edition of Membrain's award-winning CRM, which unlike other more generic CRM platforms is specifically designed and optimised for complex B2B sales environments.

Membrain's opportunity management module can either be implemented as part of their fully integrated B2B-optimised CRM platform, or integrated into an existing salesforce.com instance.

Whilst any of the above routes will provide an effective way to adopting MEDDPICC+RR, our strong preference - particularly whenever clients are not completely satisfied with the return on investment in their existing CRM (very few are) - is the fully integrated approach offered by the Outcome-Centric Selling® edition of Membrain CRM.

In addition to offering superior B2B-focused functionality, Membrain's platform is significantly more cost effective under almost any equivalent circumstances to the market-leading generic CRM solutions.

We're here to help

If - as we hope and expect - the principles in this guide resonate with what you're seeking to achieve within your own sales organisation, we should talk.

Please follow this link to arrange a call.

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About us

Inflexion-Point Strategy Partners are a UK-based sales effectiveness consultancy with a global client footprint, and we are proud to be one of the pioneers in enabling forward-thinking sales organisations to adopt an outcome-centric approach to selling.

Many of our clients are technology-based businesses in the all-important scale-up phase between being a start-up and behaving like a slow-moving established corporate.

As we hope this document demonstrates, we have a great deal of practical experience in what it takes to implement an accurate and robust opportunity qualification regime in complex high-value B2B sales environments.

If you like what you have read in this guide, if you believe what we believe about the future of B2B selling, and you are curious enough to want to find out more, please drop me a line or book a call.

Regards

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