

OUTCOME-CENTRIC SELLING® | CUSTOMER-SPECIFIC VALUE STORY TEMPLATE

ORGANISATION	PROJECT	OWNER	CREATE DATE	UPDATED	OPPORTUNITY TYPE
Company Name	Opportunity Name	Salesperson	dd-Mmm-yy	dd-Mmm-yy	NEW CUSTOMER
PROBLEM SUMMARY: How would your customer describe their business problem in a single short sentence?					

WHY CHANGE?

CURRENT SITUATION	GOALS/DESIRED OUTCOMES	OBSTACLES	COST OF INACTION
Briefly summarise their current situation	Briefly summarise their key goals/desired outcomes, how they will measure success and the timeframe over which they need to be achieved	What are the obstacles that could prevent them from achieving their desired outcomes, how they have tried to deal with them, and with what results?	What are the costs and consequences of failing to achieve their desired outcomes on the organisation as a whole, on the affected functions and on key stakeholders?

WHY YOU?

SOLUTION OPTIONS	YOUR DISTINCTIVE APPROACH	YOUR UNIQUE BENEFITS
What other credible solution options (both in-house and vendor-provided) are they actively considering?	What sets your approach apart from all their other potential options?	What unique benefits will your approach offer to the organisation as a whole, to key functions and to key stakeholders?

WHY NOW?

BUSINESS CASE/URGENCY	EVIDENCE/DECISION CONFIDENCE
Briefly summarise their business case - contrasting the costs and consequences of inaction with the realistic projected return on investment as well as the non-financial reasons to change and explaining why action is urgent	What evidence can you offer to give them confidence in the need for change, the importance of urgent action and their choice of your company and your solution?

GUIDELINES

Establishing and confirming each customer's specific value story is an iterative process that must involve key their stakeholders and incorporate their feedback. The exercise is invaluable in qualifying the opportunity, and the final mutually agreed value story will provide the basis for the executive summary of your proposal

BASIC INFORMATION

Capture the organisation, project, owner and create date. Revise the UPDATED field whenever you edit the value story

OPPORTUNITY TYPE

Choose the best fit from NEW CUSTOMER, NEW PROJECT, EXPANSION, RENEWAL, UPGRADE, MIGRATION

PROBLEM SUMMARY

How would your customer summarise the business problem to their colleagues in a single short, sentence?

SITUATION

Explore and briefly summarise the customer's current situation, highlighting the business issues your organisation is particularly good at solving

GOALS/DESIRED OUTCOMES

Next, summarise the customer's goals/desired outcomes (things they need to fix, accomplish or avoid), highlighting the goals your solution is particularly effective at helping them achieve. Your objective must be to establish the strongest possible contrast between their current situation and their future goals, and to define the timeframe over which these goals need to be achieved

OBSTACLES

Having established their current situation, goals and impact, you must now identify the obstacles that are standing in their way. Once again, these need to be obstacles your solution is particularly good at eliminating

COST OF INACTION

Having contrasted their current situation and their goals/desired outcomes, you must now establish the impact of failing to achieve these goals. Your objective must be to amplify the danger of remaining on their current path by ensuring that the perceived cost, risks and negative consequences of sticking with the status quo far outweigh the investment required to change

You must show the danger of sticking with the status quo on the organisation as a whole, on the affected functions and on each of the key stakeholders

SOLUTION OPTIONS

Now that you have established the strongest possible case for change, you need to understand if and how they may have already been trying to deal with the problem (and with what results), and what they now regard as their potential solution options

These options will often go beyond what you regard as your conventional competition. They may include in-house development or an attempt to solve the problem in a completely different way (for example, employing more people rather than increasing automation)

YOUR DISTINCTIVE APPROACH

On the basis of everything you have established to date, what are the handful of distinctive advantages that separate your approach from all their other options? It is always best to find one or a few easy-to-remember distinguishing themes rather than a long list of hard-to-remember features.

One way of thinking about this is to imagine that your champion is asked by another as-yet unconvinced stakeholder "so what is it about [YOUR COMPANY] that sets them apart?" Assume that their response needs to be short and to the point. What would you hope they would say?

YOUR UNIQUE BENEFITS

Based on all that you have learned about their situation, their goals, their reasons to change, their alternative options and your distinctive advantages, how would you summarise the specific advantages of your proposed approach?

What unique benefits does your proposed solution offer to the organisation as a whole, to each of the key functions and business units, and to each of the key stakeholders?

BUSINESS CASE/URGENCY

Based on what you have learned about their internal investment guidelines, how would you summarise the business case - including the costs and risks of inaction, the benefits of change and the relative priority of the project?

EVIDENCE/DECISION CONFIDENCE

Finally, what evidence can you offer (from both your own and external sources) to give them confidence in the decision to change, the importance of urgent action and their choice of your company and your solution?