

OPPORTUNITY PLAN

ORGANISATION Company Name		PROJECT Opportunity Name		OWNER Salesperson		CREATE DATE dd-Mmm-yy		OPPORTUNITY TYPE NEW CUSTOMER		UPDATED dd-Mmm-yy	
VALUE £k	CLOSE DATE dd-Mmm-yy	CLOSE DATE BASIS CHOOSE BASIS	CURRENT PHASE CHOOSE PHASE	DECISION % 0%		WIN % 0%		OVERALL % 0.0%		FORECAST PIPELINE	
IS THIS AN <input type="checkbox"/> INEVITABLE OR A <input type="checkbox"/> DISCRETIONARY PURCHASE?				ARE THEY ON A <input type="checkbox"/> FAMILIAR OR AN <input type="checkbox"/> UNFAMILIAR BUYING JOURNEY?							
<input type="checkbox"/> QUALIFICATION CHECKLIST COMPLETED			<input type="checkbox"/> STAKEHOLDER ASSESSMENT COMPLETED			<input type="checkbox"/> MUTUAL ACTION PLAN AGREED					
PROBLEM SUMMARY: Summarise their business problem in a single sentence											
THEIR CURRENT SITUATION Briefly describe their current situation						THEIR DESIRED FUTURE OUTCOME Briefly describe their desired future outcome (and contrast it with their current situation)					
ANCHORS AND ACCELERATORS											
ANCHORS What are the constraints that are anchoring them in the present and preventing them from achieving their desired future outcome?			COST OF INACTION What would be the negative impact to the business of failing to eliminate these anchors?			ACCELERATORS What changes do they need to implement in order to accelerate their progress towards their desired future outcome?			BENEFITS OF ACTION What would be the positive impact to the business of implementing these accelerators?		
THEIR ALTERNATIVE OPTIONS What other credible options (both in-house and vendor-provided) are they actively considering?				YOUR DISTINCTIVE APPROACH What are the most significant ways in which your approach differs from all their other options in enabling them to eliminate their anchors, implement their accelerators and successfully achieve their desired future outcome?				YOUR DISTINCTIVE BENEFITS What are the most distinctive benefits your approach can offer that their alternative options would struggle to deliver?			
BUSINESS CASE Briefly summarise the business case for (1) implementing the necessary changes and (2) doing so using your solution - spanning both financial and non-financial factors						EVIDENCE What evidence can you provide to ensure they are confident in their decision to (1) accept the need for change and (2) implement your solution?					
OPPORTUNITY STRATEGY Briefly summarise your strategy for winning the opportunity						OPPORTUNITY TACTICS Briefly summarise your most important sales tactics					