

Client:

WEB: WWW.

WHAT they do: Elevator explanation	
HOW they do it: Differentiation	
WHERE they sell: Geographic market	
WHO they sell to: Target market	
WHEN they sell Seasons/cycles	
WHY they exist Mission statement	

POSITIONING – WHERE?		CONTACT	THEIR CRITERIA	GAME PLAN
	SENIOR EXECUTIVE			
	C-LEVEL TECHNICAL			
	C-LEVEL FINANCE			
	C-LEVEL OTHER			
	VP LEVEL TECHNOLOGY			
	VP LEVEL OPERATIONS			
	VP LEVEL OTHER			
	MANAGER TECHNOLOGY			
	MANAGER _____			

POSITIONING – HOW?	How are we positioned inside the account? Which competitors are also calling on this client? What are their strengths and weaknesses? What is our game plan to move into the position of Sole or Preferred provider?			
	COMPETITOR	STRENGTHS	WEAKNESSES	GAME PLAN
	There are many ways we are different from the competition. Which of these differentiations are most important to this client right now?			
UNIQUE	Why is it in this customer's best interest that they buy from us?	What is our differentiation?		
	What else do we need to know?	1. 2. 3.	Formulate questions to learn what you need to know	
	Who else in the client organization could help?			
	How much would we add to the customer's bottom line?	Qualify! Quantify!		

NOTES:

SOLUTIONS	What are the top problems this customer is facing right now? Qualify where these problems manifest themselves. Quantify the cost in each area using dollars, time, productivity, etc.		
	PROBLEM	WHERE/HOW IT HITS	COST
	#1.		
	#2.		
	#3.		
	#4.		
#5.			
HELPING	HELP INVENTORY		
	CUSTOMER ISSUE	WHAT WE DID	VALUE

NOTES:

The **solution** we propose will be based on the **benefits** of some of the **features** of our product.

PROPOSAL

PROBLEM	SOLUTION	BENEFIT	FEATURE	PRODUCT

NOTES: