<table>
<thead>
<tr>
<th>Opportunity Conversion Process</th>
<th>Sales History/Customer List</th>
<th>Suppliers Lists</th>
<th>Competitive Intelligence</th>
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<tbody>
<tr>
<td>Opportunity Generators</td>
<td>Referral Sources/Alliances</td>
<td>Industry lists</td>
<td>Trade Shows/Conferences</td>
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<td>Networking Events/Business Events</td>
<td>Seminars/Speaking Engagements</td>
<td>Newsletter / E-Blast Leads</td>
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<tr>
<td></td>
<td>Market Intelligence</td>
<td>Active Marketing Efforts</td>
<td>Inbound Marketing Efforts</td>
</tr>
</tbody>
</table>

### Suspects
- **Pre-Work**
  - Identify Suspect
  - Awareness Made
  - Information Sent
  - Action Plan Set
  - Market Presence
  - Credibility
  - Capability

- **Milestones**
  - Message Received
  - Make the Call
  - Contact Made
  - Two Way Conversation
  - Qualify Target
  - Or Disqualify Prospect

- **Customer Buying Process**
  - Not Looking
  - Need Help
  - Don’t Know
  - Looking at Trends
  - Tracking Competition

- **Targeted Outcome**
  - Awareness Shown
  - Interest
  - Identify Target
  - Qualify Target
  - Say “Goodbye”
  - Information Requested

- **Selling Tools**
  - Prof. Client Profile
  - Success Stories
  - Referrals
  - Account Audit Form
  - Request for Proposal

### Marketing Support Tools
- Website, Newsletter
- Social Media, Public Relations
- Email Signature
- Thank You Card, Billing
- Reports/SBR
- Pitchbook/Cut Sheets
- Proposal/Contract
- Success Stories, Phone Scripts
- Sales/Customer Support

### Velocity

#### Opportunity
- **Prospect**
  - Warm Introduction
  - Quality/Target as ideal
  - Pre-Seed Information
  - Meeting Scheduled
  - Action Plan Set

- **Targets**
  - Background Information
  - Meeting Scheduled
  - Action Plan Set
  - Resources Secured
  - Team Commitment

- **Discovery Meetings**
  - BANT Identified
  - Questions answered
  - Know “how they buy”
  - Consulted Internal Resources
  - Opportunity Filter
  - Action Plan Set
  - Know Your Value

- **Solutions**
  - Timely Response
  - Internal Support Buy-In
  - Project Management
  - Pricing/Terms
  - Capacity in Place

- **Proposals**
  - Defined a Need
  - Framing Expectations
  - Exploring Options
  - Reconfirm Requirements
  - Developing Case
  - Waiting for You
  - Looking for Excuses
  - Solve Themselves?

### Additional Solutions
- Win-Win Solution
- Objectives Navigated
- Action Plan
- Clear Next Step
- Negotiation
- Acceptance of Terms
- Approval Submitted
- Soft Close
- Sunergy

### Discovery Meetings
- RFP Format
- Contract Format
- Discovery questions
- Audit Results
- Opportunity Filter
- Referral
- Technical Expertise
- Internal Resources

### Post
- Credit Approval
- Delivery Defined
- Check References
- Confirm Decision
- Finalize Case
- Gain Approval
- Produce PO
- Expect Follow-Up Commitment

### Repeat Business
- Referral
- Additional Business

### Post
- Review Scope
- Strategic Business Review
- Endorsements

### Volume
- 

# Close = Goal/ "Ideal Client" Avg. Value

Personal Goal = Target Revenue/Commission %