

## P3 Selling Deal Review

A P3 Selling Deal Review involves asking yourself questions in five critical areas to understand your current state, assess your risks, and develop an action plan. It's okay to say "I don't know" or "I'm not sure" but it's not okay to guess or assume. Put a question mark ("?") next to any information where you are unsure. Use the questions below to develop your best action plan:

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| <b>Review Date:</b>                                                                                                                                                                                                                                     |  |
| <b>Company Name:</b>                                                                                                                                                                                                                                    |  |
| <b>Sales Person:</b>                                                                                                                                                                                                                                    |  |
| <b>Potential \$ Value of Opportunity and Close Date:</b>                                                                                                                                                                                                |  |
| <b>Prospect's Corporate Buying-Decision Stage</b>                                                                                                                                                                                                       |  |
| <b>When was the last appreciable action the prospect performed to move the buying decision forward?</b><br>- <i>What, by whom, when?</i><br><br><b>Based on this and the reasonable timeframe you've established, is this prospect still "dancing"?</b> |  |

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| <b>1. Problems</b>                                                                |  |
| a. What Problems has your prospect explicitly stated interest in addressing?      |  |
| b. Which Problems can you address more effectively than competitive alternatives? |  |



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| <p>c. What are your prospect’s perspectives regarding the Impact and Urgency of addressing these, personally and corporately?</p> <p>Has your prospect quantified the Impact of not addressing the Problems?</p> |  |
| <p>d. From your prospect’s perspective, is the Importance of addressing these Problems large enough to warrant the time, investment, and potential risk involved in making a purchase decision?</p>              |  |
| <p>e. What are your prospect’s perceptions regarding options to address the Problems?</p>                                                                                                                        |  |
| <b>2. People</b>                                                                                                                                                                                                 |  |
| <p>a. Who are all the People expected to be involved in the company’s buying-decision Process?</p> <ul style="list-style-type: none"><li>i. Problem People</li><li>ii. Process People</li></ul>                  |  |
| <p>b. What is the level of Decision Influence for each of these People?</p> <p><i>Decision Influence = Authority (1 to 3) + Drive (1 to 3)</i></p>                                                               |  |



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THE ESSENTIALS OF B2B SALES SUCCESS

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| <p>c. How confident are you that you know all the People involved? Where might there be others?</p> <p><i>Decision Influence = Authority (1 to 3) + Drive (1 to 3)</i></p>                                                                                                                                                        |  |
| <p>d. For Problem People with a high level of Decision Influence, what are their perspectives regarding each Problem's Importance (Impact and Urgency)?</p>                                                                                                                                                                       |  |
| <p>e. For Process People with a high level of Decision Influence:</p> <ul style="list-style-type: none"><li>i. In which buying-decision Process steps will they be involved?</li><li>ii. What criteria are they likely to focus on?</li><li>iii. What are their perspectives regarding the "correct" decision criteria?</li></ul> |  |



| 3. Processes                                                                                                                                                                                                          |  |
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| a. Who initiated the buying-decision Process, when, and why?                                                                                                                                                          |  |
| b. In which buying-decision stages are People with a high level of Decision Influence?<br><br><i>Refer to "Defining the Buying-Decision Stage" table.</i>                                                             |  |
| c. What does the company's stated buying-decision Process look like (People, steps, timeline, etc.)?                                                                                                                  |  |
| d. Which elements of the decision Process (steps, criteria, policies, People, information sources, etc.):<br>i. Highlight our solution strengths?<br>ii. Highlight our competitors' or other alternatives' strengths? |  |



| 4. Analysis: What are our risks?                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |  |
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| <p>a. Information Risks:</p> <ul style="list-style-type: none"><li>i. Where do we lack or are unsure of critical Problem, People, or Process information?<ul style="list-style-type: none"><li>a. What have People not specifically said or done to confirm our understanding?</li><li>b. How confident are we in the information our primary contacts have provided?</li></ul></li></ul>                                                                                                                    |  |
| <p>b. Problem Risks:</p> <ul style="list-style-type: none"><li>i. Is there a low awareness of Problems that we can solve?</li><li>ii. Is there a low awareness of the Importance in addressing the identified Problems?</li><li>iii. Is the quantified Impact of not addressing the Problems large enough to warrant the effort and risk involved in making a buying-decision?</li><li>iv. Are there alternatives to our solution that can address the identified Problems equally well or better?</li></ul> |  |



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| <p>c. People Risks:</p> <ul style="list-style-type: none"><li>i. Are there only a small number of People involved in the buying-decision that are aware of the identified Problems?</li><li>ii. Are there only a small number of People involved in the buying-decision that perceive addressing the Problems as Important?</li><li>iii. Have all People involved in the buying-decision been identified?</li><li>iv. Are there People with high Decision Influence with a preference for alternative ways of addressing the Problems (not with us)?</li><li>v. Are there People with high Decision Influence whom we've not understood and influenced their perspectives?</li></ul>                                                                                                                             |  |
| <p>d. Process Risks:</p> <ul style="list-style-type: none"><li>i. Are there People with high Decision Influence at different stages in the buying-decision Process?</li><li>ii. Are there People who have progressed to late stages in the buying-decision Process where we have not had an opportunity to understand and influence their perspectives on Problems, People, or Processes?</li><li>iii. Are there People highly motivated to address the identified Problems that are not part of the buying-decision Process?</li><li>iv. Have we provided information that focuses on the identified Problems and aligns with each individual's decision stage?</li><li>v. Are there any compliance constraints that would make a buying-decision difficult at this time (contractual, budget, etc.)?</li></ul> |  |



| 5. Actions                                                                                                                                                                                                                                                                                                                                                                         |  |
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| <p>a. What are all the things we could do next to:</p> <ul style="list-style-type: none"><li>i. Address our information gaps (unknown or unsure)?</li><li>ii. Reduce our Problem, People, or Process Risks?</li><li>iii. Advance People to the next decision stage?</li></ul> <p><b>Refer to “Establishing Selling Objectives and Key Activities” table for ideas.</b></p>         |  |
| <p>b. Consolidate the list above where possible and select the highest priority and impactful actions.</p>                                                                                                                                                                                                                                                                         |  |
| <p>c. For each action, consider what credible resources you could leverage to increase your odds of success.</p> <ul style="list-style-type: none"><li>i. For example, what people (theirs, yours, external), tools, documents, demos, etc., would help you gain access to a critical decision participant, create greater awareness, or resolve a potential constraint?</li></ul> |  |
| <p>d. Document who will do what and by when.<br/><i>- Be sure to set a time to review the results of your action plan</i></p>                                                                                                                                                                                                                                                      |  |