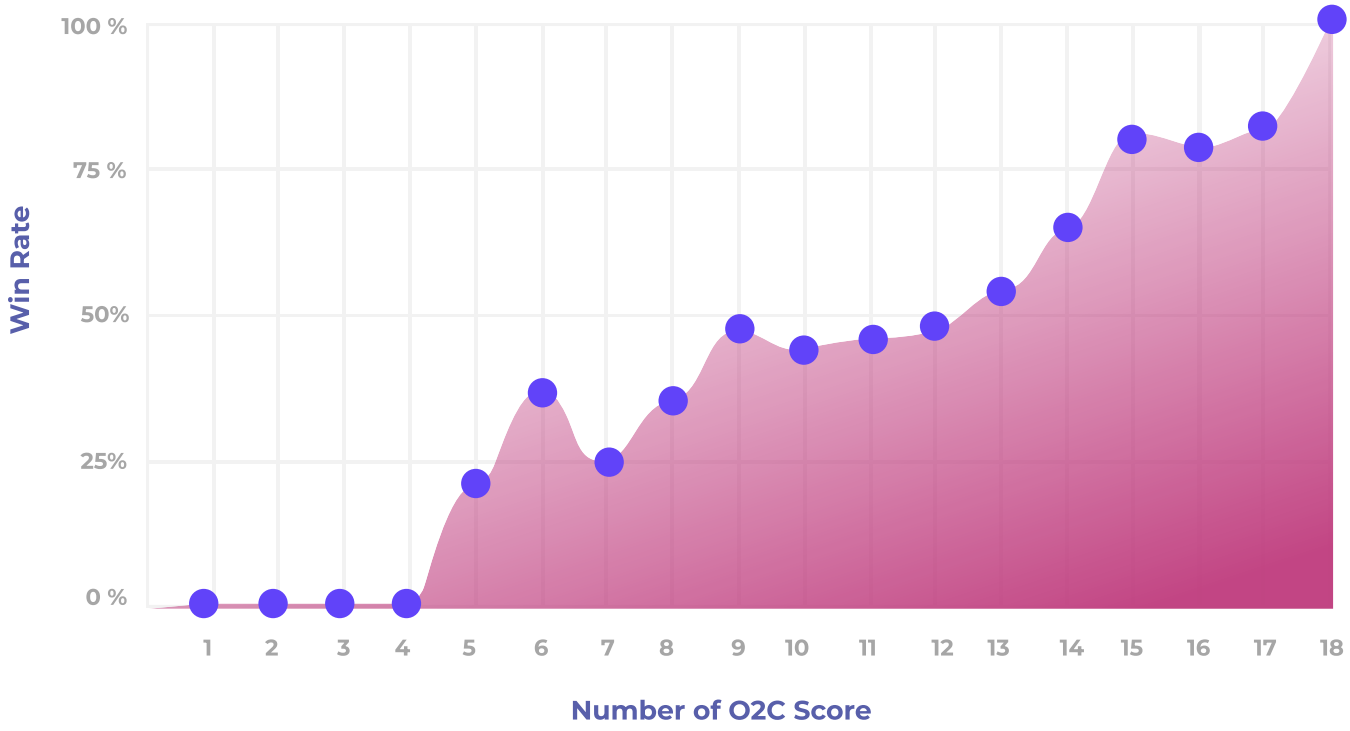
REVHEAT

Opportunity to Close Roadmap™

The Opportunity to Close Roadmap™ is an objective way to score the 6 most important factors in closing a sale. It can be used as an objective scorecard in your CRM or as a way to balance the salesperson's emotion about a potential deal with whether the facts exist to support their position, good or bad. Each of the 6 components are scored from 0-3 points with a perfect deal total of 18.



(validated across 222 potential opportunities)

Business Motivation

1: There is a known need, but it may be small and tactical.
2: The Ambassador can match the need to a 12-month or longer strategic priority, but it has not been validated by the Decision Maker.
3: Pain and priorities have been validated by the Decision Maker, and you agree that the need is urgent and important to the business.

Ambassador

1: You've identified the Ambassador and have met with them, but you have not articulated their personal win or confirmed their commitment to your solution.
2: The Ambassador has articulated their personal win and confirmed their commitment to your solution but has not taken you to the Decision Maker.
3: The Ambassador has taken you to the Decision Maker and is actively selling on your behalf.

Decision Maker

1: You've identified the Decision Maker, but you have not validated business priorities or confirmed budget and project priority.
2: You've met with the Decision Maker and validated business priorities, but budget and project priority have not been confirmed.
3: You've validated budget and project priority (and compelling event) with the Decision Maker.

Competitors

1: You know who the competition is, but the prospect cannot articulate competitive strengths and weaknesses.
2: You've differentiated your solution from the competition, and the prospect can articulate competitive strengths and weaknesses.
3: You've validated that your solution is the preferred solution with the Decision Maker.

Decision Process

1: The Ambassador has articulated the decision criteria, but you have not validated them with the Decision Maker.
2: You've validated the decision criteria and process with the Decision Maker, but you have not confirmed that you've won the decision criteria.
3: You've confirmed that you've won the decision criteria, and the Decision Maker has agreed to move forward with your solution.

Paper Process

1: You've explicitly confirmed the paper process with the client, but you have not entered it yet.
2: You've entered the paper process, have a defined timeline, and legal redlines have been returned, but there is no compelling event or intervention needed.
3: The Decision Maker will intervene as needed to move the paper process forward, and there is a compelling event driving the sale.