

Opportunity Planning Checklist:

How Sales Reps Can Win More Opps



Sales is all about finding and making the most of each opportunity. Opportunity planning is the vital process by which a sales team can discover and qualify the deals with the best potential. This Opportunity Planning Checklist is a quick and easy way to see how ready you are to find, pursue, and close an important deal, based on the Five Factors of Opportunity Planning: the five fundamentals of every successful sale.

How to use this checklist:

Start with the first section and check off and/or fill in each item. By the end, you'll see where your opportunity plan is strong and where it's lacking. You'll then be able to use this checklist as a guide to creating an opportunity plan capable of taking on - and winning - any deal.

FACTOR 1: Discovery

The more you understand a customer, the more likely you are to succeed. Discovery is where a sales team uncovers initial info that'll inform the rest of the sales process.

- Establish whether or not the team has a budget
- Explore their current processes and structure
- Understand the customers' challenges
- Identify competitors they're evaluating

FACTOR 2: Relationships

Sales are made through people, not process. The more you understand the relationships inside an account - including who influences who, and which contacts can help you move the deal along - the more successful you'll be.

Who is your champion?

Who is another top supporter?

Who are your potential blockers?

Who do you believe has the most influence in the deal?



FACTOR 3: Mutual Plan

The Mutual Plan helps you coordinate your internal resources and align them with the customer's journey, buying process, and timeline. This ensures synchronization between everyone involved in the deal.

- Outline and understand the customer's buying process
- Clarify the customer's ideal go-live timeline
- Break down the milestones, outcomes, and stakeholder responsibilities for each step in the Mutual Plan
- Delegate your internal team around resources needed for each milestone
- Establish mutual buy-in and agreement between clients on the proposed plan

FACTOR 4: Business Value

A deal needs to provide solid business value to the customer and to your team, based on KPIs and potential ROI. This factor helps determine if an opportunity is viable from a financial sense.

- What are the customer's KPIs?

- Quantify your product/service ROI
- Present the business case to the customer's leadership or decision making group
- Receive buy-in or agreement on the deal's potential ROI

FACTOR 5: Clear Path to Close

An opportunity needs to have a clear path to close. This goes beyond just getting a "yes"; it involves making sure you know the steps it'll take to meet all requirements, overcome potential hurdles, and bring the deal to a successful conclusion.

- Ensure the customer has the bandwidth and resources to implement
- Recognize the competing priorities
- Define a clear strategy to take the deal to the finish line
- Align on the procurement process and steps to sign a contract

Prolifiq's suite of apps, including CRUSH, our key account management and opportunity planning app, can help sales teams easily plan and coordinate account-based selling, all from within Salesforce.

For more information, contact us to see a [quick demo](#).