



SALES OPPORTUNITY MANAGEMENT SCORECARD

USE THIS OPPORTUNITY MANAGEMENT SCORECARD with well-advanced sales opportunities in your Pipeline. The scorecard will help you identify any additional information required and any further actions you could undertake while there is still time to increase the chances of winning this opportunity.

- ① Rank your responses using a 0-10 scale according to how much you know on each question, where: 0 is not very good at all as we do not appear to know much or are not being favoured, and 10 suggests we know all that is going on and things are definitely going our way.
- ② Add up your responses for a score out of 100. The higher the score, the better. The aim though, is *not* to get to 100, but rather to identify gaps and take action before the customer makes their decision.

| Assessment Questions | | Score 0-10 |
|----------------------|---|---------------|
| 1 | How much do we know about which people/roles are going to make the recommendation and the decision? <small>(nothing = 0; everything = 10)</small> | |
| 2 | How much do we know about what process and criteria they will use to decide? <small>(nothing = 0; everything = 10)</small> | |
| 3 | How does our proposal and solution rate against those criteria? <small>(not at all = 0; perfect fit = 10)</small> | |
| 4 | How much do we know about which competitors we are up against? <small>(nothing = 0; everything = 10)</small> | |
| 5 | How do the competitors rate against the same criteria? <small>(perfectly = 0; very poorly = 10)</small> | |
| 6 | What stage of THEIR buying process are they up to? <small>(not started or already decided = 0; still determining Needs and Requirements = 10)</small> | |
| 7 | When will they make a decision? <small>(no plan = 0; urgent, eg. scheduled a formal decision meeting = 10)</small> | |
| 8 | What other evidence do you have to indicate how we are progressing? <small>(no other evidence = 0; informal verbal feedback = 5; formal notification of status = 10)</small> | |
| 9 | What alternate tactics have you identified? <small>(none = 0; several eg. finance options, start dates, resource sharing = 10)</small> | |
| 10 | How are you using the resources of our organisation to help get this Opportunity over the line? <small>(not at all = 0; I have advised a few other depts about the deal = 5; I have several other depts in contact with them = 10)</small> | |

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| TOTAL [/100] | |
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