

WON Sheet

Account Manager _____

Profile

Company: _____ Customer Status: Existing New
 Contact: _____ Opportunity Size: Gazelle Elephant
 Title: _____ Customer Type: Change Growth
 Contact Character Analysis: Status Quo Pleased & Proud
 Lion Beaver Otter Retriever YE: _____ Reve-
 Ownership: Private Public Government
 Phone: _____

Business Pain

“What are the most challenging business issues your organization is faced with?”

The Opportunity

What is the name of this project? _____
 Project budget? _____ When are these funds available? _____
 When will the final decision be made? _____ Why then? _____
 What are the internal costs of not addressing this issue? _____
 Who are you currently working with (competition)? _____
 Who else are you considering? _____
 When can we return to present our proposal to your decision team in person? _____

Our Analysis

Decision Criteria/Personal Agenda

Competitive Perception

	Decision Criteria/Personal Agenda	Competitive Perception
Approver Name: _____ Title: _____	C1	<input type="checkbox"/>
	C2	<input type="checkbox"/>
	C3	<input type="checkbox"/>
	Us	<input type="checkbox"/>
Decision Maker Name: _____ Title: _____	C1	<input type="checkbox"/>
	C2	<input type="checkbox"/>
	C3	<input type="checkbox"/>
	Us	<input type="checkbox"/>
Influencer #1 Name: _____ Title: _____	C1	<input type="checkbox"/>
	C2	<input type="checkbox"/>
	C3	<input type="checkbox"/>
	Us	<input type="checkbox"/>
Influencer #2 Name: _____ Title: _____	C1	<input type="checkbox"/>
	C2	<input type="checkbox"/>
	C3	<input type="checkbox"/>
	Us	<input type="checkbox"/>

Summary

Close Date _____ Lead Measurement Rating
 Revenue Size \$ _____ Reference Accounts _____
 1 _____
 2 _____

The Pipeline

- Interested
- Discovered
- Qualified
- Selected
- Closed
- Reference

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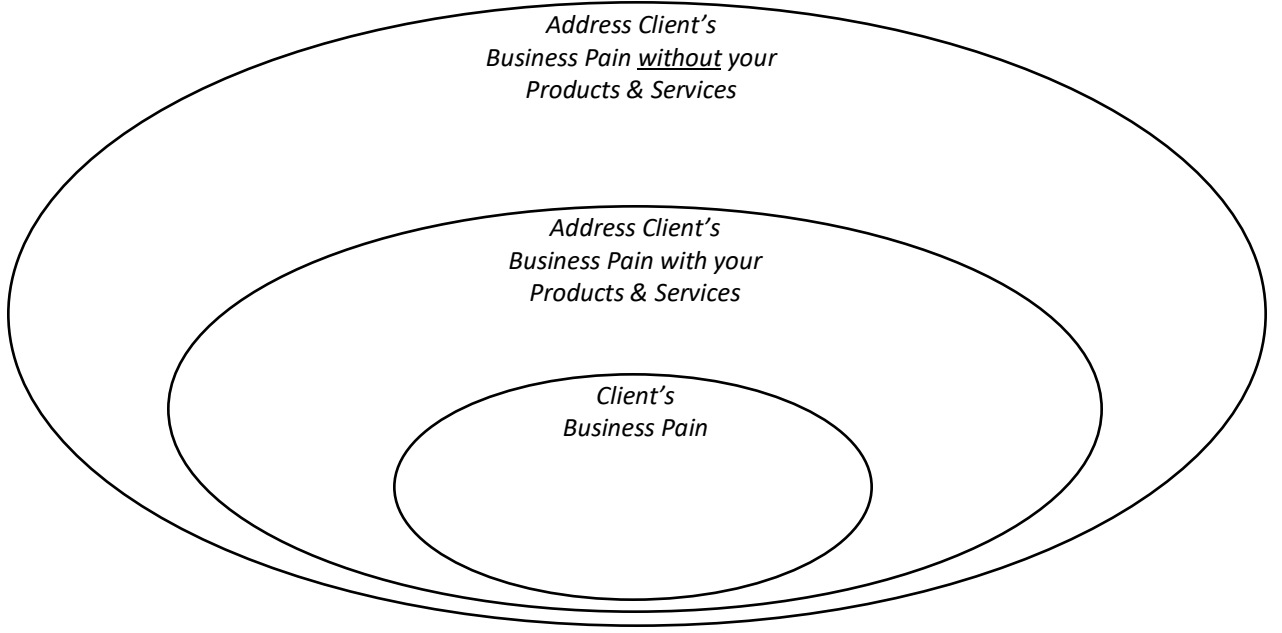
Action Plan

Strategy: Close Now Change Rules Split Deal Delay Deal Abandon

Next Steps:

Objective	Task	Owner	Date

Consultative Approach



Win/Loss Analysis

Company: _____ Project: _____

Decision Date: _____ Revenue Size: _____

Who won the business? We did Competitor: _____

Why did this outcome happen? _____

What did we learn? _____
