Opportunity Playbook for Strategy Mapper - Salesforce

Here is the Opportunity Playbook for **Strategy Mapper - Salesforce** as of **12/17/2015**. With a decision date of **1/29/2016**. We currently have **43** number of days until the decision is reached. Is the customer's project budgeted? **Yes**.

Forecasted Revenue: **$20,000.00**
Current Stage: **Needs Analysis**
Probability: **20%**
Close Date: **3/31/2016**

The current opportunity score and the solution score are: **63** and **75**.

Based on the information gathered, the opportunity score is **63** to raise the score and increase the probability of winning the opportunity, look at accomplishing the following:

Change Sally Binkley′ s Stance or Role, currently a yellow flag

Engage with customer to identify:

Buyer

Engage with customer to remove:

Objections

The solution score is **75**, based on the customer requirements. Any score below 60 may indicate this is an unwinnable opportunity unless the customer requirements change, or products and solutions on the roadmap are released before the decision date of **1/29/2016**.

Products/Solution Positioned to Meet Customer Requirements

Requirement	Solution	Solution Help	Solution Score
Supports Andorid	GenWatt Diesel 10kW	Partially meets requirement	50
Support SF1	GenWatt Diesel 200kW	Meets Requirement	100
100% Native Salesforce	GenWatt Diesel 200kW	Meets Requirement	100
Robust reporting	GenWatt Diesel 200kW	Partially meets requirement	50

The Value Proposition we and our products/solutions bring to the customer is:

Strategy Mapper is redefining how sales organizations sell by using robust and accurate information to efficiently drive revenue. Customer meetings are at the heart of the sale cycle but are the least documented in an organization's CRM. Strategy Mapper gathers customer intelligence and turns this information and data into the building blocks or "DNA" of Account Strategy and Opportunity Planning and does it in real-time as each sales cycle progresses.
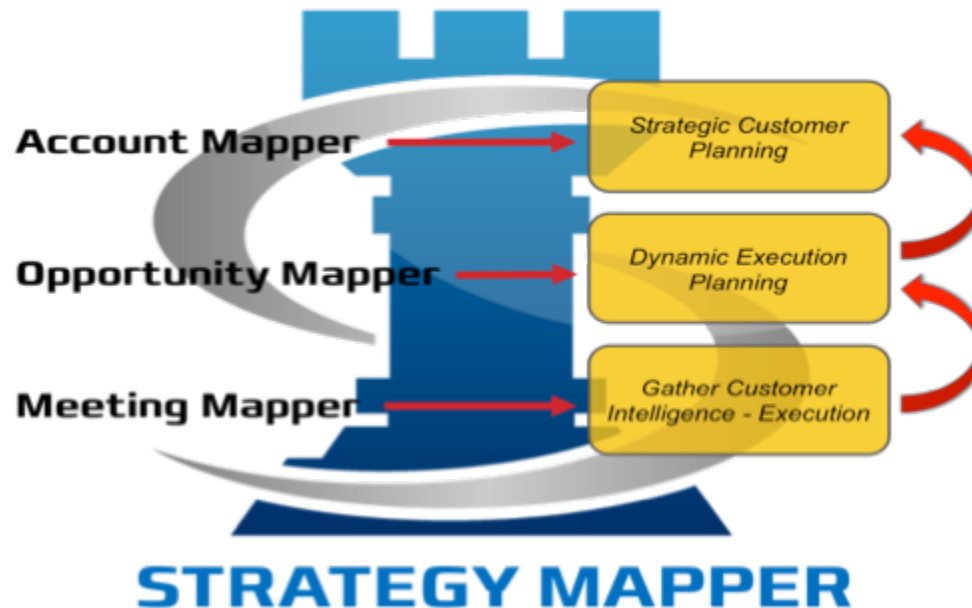
The strategy to win this opportunity is:

Our strategy is to use a frontal attack, we have a superior solution based on the initial customer meeting. We will leverage the following:

We are an ideal fit based on the following customer requirements:

- 100% integration with Salesforce
- Ability to map to their current sales methodology
- Mobile access from any device via native Salesforce products
- Mobile access from iPad using Meeting Mapper mobile
- Meeting Planning and Execution
- Opportunity Planning
- Account Planning

Based on customer requirements we will position Strategy Mapper as the leader and innovator because:

- Strategy Mapper aligns to their sales methodology
- Easy to configure
- Quick ROI – The most cost effective solution on the market

The following tactics are in support of the strategy to win:

- Leverage current 'What's Hot' from customer meetings. https://na14.salesforce.com/01Zd0000000lTBl
- Crawl, Walk, Run deployment method
- Meeting templates
- Opportunity Mapper templates
- Account Mapper templates
- Ease of installation and configuration (up and running the same day)
- Actionable Intelligence
- Data points gathered by Meeting Mapper
- 5 Star rating on Salesforce Appexchange
- Reference customers

Customer Buying Process

The customer is currently in **Sign contracts.** of their buying process. They have completed their process below. We are currently in our selling stage of **Needs Analysis**.

Process	Completed	Current Stage
Identify the Problem.	Yes	
Review Options.	Yes	
Sign contracts.	No	Needs Analysis
Pilot/Trial selected vendor.	No	
Bring in top 3 vendors.	Yes	

Competitors

The following competitor(s) have been identified, along with their strengths and weaknesses.

Competitor	Strengths	Weaknesses
Acme	Big	Small
ABC Company	Good solution and they have a very good footprint in this vertical space.	High price and based on all Salesforce users not just the ones requiring the solution.
Big Orange	Low price.	Limited feature set.

Customer Intelligence

We have identified the following customer Pain Points:

Pain Points	Pain Points Free Form

Low usage of Salesforce	
Not collecting KPIs.	
Teams Not Practicing Sales Methodology	

Based on these customer pain points, our strength(s) are:

Our Strengths	Strengths Free Form
5 Star rated on AppExchange	
Configurable solution	

We have also identified the following objections:

Objections to Overcome	Objections Free Form
No resources	

Our mitigation plan for these objections is:

We will ensure the customer knows we can and will assist with the installation, post configuration support and training. We will remove this objection.

Customer Team

Name	Role	Stance	Notes
Jordan Day	Decision Maker;Economic Buyer	For	Jordan, is committed to Strategy Mapper and has already started to build his strategy around it.
Bob Fox	Decision Maker	For	
Karl Bush	Champion;Decision Maker;Evaluator	For	Karl has used Strategy Mapper in a previous company and brought us in.
Sally			

Binkley	Evaluator	Undecided	

Scheduled Activities

We have the following activities:

Subject	Name	Task	Due Date	Status	Priority	Assigned To
Task for QM - 12/14/2015 7:21 PM		Yes	12/14/2015	In Progress	Normal	Dev User

Manager Comments

The plan is really coming together. We need to make sure we identify any weaknesses, objections and obstacles we could encounter. I would like to schedule an on-site in the next couple of weeks, if we can't secure an on-site let's schedule a conference all.

Team Comments

Travis - I'm setting up a great demo for this customer and really show them how we can overcome their pain points.