

FUNNEL SCORECARD_{SM}

Company: _____

Date of Scoring: _____

SSO:

Product:

Revenue:

Close Date:

Place in Funnel:

BUSINESS CRITERIA

	SCORE	YES		NO		UNKNOWN	SCORE
B1. Identifiable Organizational Objectives	10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
B2. Miller Heiman Alumni	9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
B3. Seeks Complete Sales Operating System	7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
B4. Joint Venture Approach	6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
B5. Committed Senior Sponsors	5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
B6. Process Driven/Methodology Driven	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
B7. Critical Mass of Salespeople	2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
B8. Willing to Invest in Training	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
B9. Initial or Continued Investment in Revenue Generation	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

SUB TOTAL: _____

OPPORTUNITY CRITERIA

O1. Alignment Between Unique Strengths and Concept	10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
O2. EB Positive Mode and Rating	10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
O3. Coach in Place	10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
O4. Access to Cover the Bases with all Key BI's	6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
O5. Mutually Understand the Client's Buying Process	5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
O6. Budget and Funds Available	5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
O7. Commitment to Reinforcement and Implementation up Front	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
O8. Timing for Decision is Active or Urgent	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
O9. Value of Personal ROI	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
O10. Developed Competitive Strategy	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

SUB TOTAL: _____

TOTAL SCORE

Complete this portion after the company has made its decision.

Date of Company's Buying Decision: _____

SSO: Won Lost

BUSINESS CRITERIA

B1. Identifiable Organizational Objectives

Alignment between customer's expected results and our measurable outcome

B2. Miller Heiman Alumni

Current or past attendee who is a strong advocate of MHI methodology and has high credibility within the organization

B3. Seeks Complete Sales Operating System

Individuals within an organization whose concept includes a total solution for Sales Effectiveness centered on strategy, structure, people, and process

B4. Joint Venture Approach

Willingness to bring us in early to engage in a two-way communication resulting in a Win-Win relationship

B5. Committed Senior Sponsors

The majority (75% or more) of high influence executives support our solution

B6. Process Driven/Methodology Driven

Consistently follow structured strategic steps to achieve a goal utilizing appropriate metrics

B7. Critical Mass of Salespeople

Client is of appropriate size and/or sophistication to justify business relationship

B8. Willing to Invest in Training

Measures Sales Effectiveness as a critical part of corporate culture

B9. Initial and/or Continued Investment in Revenue Generation

An organization that has committed funds in the past or continues to expend funds to improve business development activities

OPPORTUNITY CRITERIA

O1. Alignment Between Unique Strengths and Concept?

Able to position MHI Unique Strengths as best fit to customer concept

O2. EB Positive Mode and Rating

EB is in Growth or Trouble mode with a rating of +3 or better

O3. Coach in Place

At least one BI meets Strategic Selling Coach criteria and is willing to act in support of our SSO

O4. Access to Cover the Bases with all Key BI's

We know whom all the key BI's are and we are not blocked in our attempts to meet with them

O5. Mutually Understand the Client's Buying Process

We help the client identify and/or develop the buying criteria and timeline

O6. Budget and Funds Available

Funds allocated or at least available at discretion of EB

O7. Commitment to Reinforcement and Implementation Up Front

Key BI's understand this is a process not an event, they understand their role and are willing to engage

O8. Timing for Decisions is Active or Urgent

Key BI's understand the sense of urgency and are willing to take action

O9. Value of personal ROI

Compared to other SSO's does this one command our own sense of urgency

O10. Developed competitive strategy

Positioned to execute against Strengths and Red Flags relative to Position vs. Competition