

Needs Analysis Record

Prospect/Customer
Salesperson
Date

Important information obtained prior to needs analysis

Phase 2 Needs

List all uncovered

It's a legitimate assignment when it rocks BOTH their "Richter Scale" and ours!

Richter Scale ratings (1-10)		
		Theirs
1		
2		
3		
4		
5		
6		

*The need rocks the prospect's Richter Scale when it causes sleepless nights and they're more than willing to spend money to fix it.
The need rocks our Richter Scale when it's a need in search of a solution within our capabilities to deliver.*

Phase 3 Assignment

The prospect/customer and I have agreed that the **Assignment** on which we will focus our joint efforts is:

Phase 4 Analysis

Here's a big empty space to fill with everything you have learned about the assignment you've established. The more you write the better.

Your Analysis might offer answers to questions such as: *What makes this need important? What has prompted it to go to the top of your priority list? What sorts of efforts have you already made, or considered, to tackle this need? What makes it tough? What would success look like? What are some things you would need to see in the ideal solution? Why don't you have a solution already? And similar questions...*