## 

OPPORTUNITY REVIEW WORKSHEET:

Explore and Strategize

+ Present and Close



## Opportunity Review Worksheet

Instructions:

1. Use this worksheet to prepare for any prospect meeting, including the Exploratory Call, Goal Setting & Planning Call, or the Present & Close Call.

2. Use [File | Make a Copy] to save a copy to your own Google Drive. You can then edit, as well as share with your CAM or others by using [File | Share]

3. Complete as much as you can given where you are in the sales process. Plan to gather information to fill in blanks at your next meeting.

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| **Company Information** |

|  |  |
| --- | --- |
| Company name: | URL: |
| Is the lead registered with Hubspot? | Other Important Company Information: |

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| --- |
| Key Contact Information |

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Role | LinkedIn URL | Other Notes |
|  |  |  |  |
|  |  |  |  |
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| --- |
| Excite |

|  |  |
| --- | --- |
| Is the prospect excited about Inbound? |  |
| If yes, what aspect do they find most exciting? |  |
| What other aspects do they find exciting? |  |

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| --- |
| Qualify |

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| --- |
| BANT |

|  |  |  |
| --- | --- | --- |
| What is the Prospect’s…. | Score (1-10) | Comments |
| Overall BANT |  |  |
| Budget |  |  |
| Authority |  |  |
| Need |  |  |
| Timing |  |  |

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| --- |
| Goals, Plans, Challenges |

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| --- | --- |
| **What are the Prospect’s….** | **Description** |
| **Goals** |  |
| **Plans** |  |
| **Challenges** |  |

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| --- |
| Cost of Inaction & Compelling Reason |

|  |  |
| --- | --- |
| What is the Prospect’s…. | Description |
| Compelling Reason to Make a Change? |  |
| Cost of Inaction? |  |

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| **For Hubspot Demo** (especially useful if involving your CAM in a demo) |

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| --- | --- |
|  | Description |
| On what Hubspot tools should the CAM focus? |  |
| What potential hazards should be avoided (i.e. areas of political or other sensitivities)? |  |
| What happens after the demo? |  |
| What systems are currently in place? (i.e. CRM, email, SEO, analytics, content management, etc) |  |