

ActionOI - OPPORTUNITY CHECKLIST

Sales should use this checklist to identify if a lead can be converted to an opportunity. Please fill in as much information as possible since it will help understand client needs thus driving solution design and pricing.

Name of the opportunity - _____

1) What are your top priorities and can you rank them in order of importance?

Table 1: Top Priorities

Rank	Priority Name
1	
2	
3	
4	
5	

2) Have you set specific targets for 2017?

If YES,

a. How did you go about the process of target setting?

b. What would you like to do differently if you could?

c. What data do you want to see that you are not getting?

d. How comfortable are you that the targets are achievable?

- a) 100% comfortable
- b) Very comfortable
- c) Somewhat comfortable
- d) Somewhat uncomfortable
- e) Very uncomfortable
- f) 100% uncomfortable

e. Have 2017 targets been communicated?

- o **If yes**, what has the reaction been?

- o **If no**, what is the current communication plan and what reaction to you anticipate?

If NO,

f. What can you tell us about how you plan to go about 2017 target setting?

3) What data and tools do you have access to (i.e. Premier)?

Table 2: Data and Tools Resources

Data/Tools	Comfort that data/tool will support your initiative (1 – not confident at all; 2 – somewhat not confident; 3 – not confident or confident; 4 – somewhat confident; 5 – 100% confident)
1.	
2.	
3.	
4.	
5.	
6.	
7.	

a. Gaps
Table 3: Current Gaps that Exist

Gaps that Exist	What would you do to close these gaps?
1.	
2.	
3.	
4.	
5.	

4) In the past, you have mentioned that you hoped to have a performance benchmarking tool live later this year to support you in 2018. Is that still the case?

If **YES**,

a. How do you plan to make your decision on a benchmarking solution?

If **NO**,

b. What has changed and how do you see yourself proceeding now?

5) What is your current plan for organizing to address the 2017 targets?

a. How comfortable are you that you have the team in place to start making progress?

b. How well have your frontline managers bought into the process?

c. What support do you think that you'll need?
