



Plan2Close

Guidelines

Version 4.0+



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Overview

4x4 Questions	
Purpose	To guide you to build a winning sales plan (the Plan2Close) for your sales opportunities.
Description	<p>The 4x4 asks questions focused on the four areas fundamental to achieving a successful sale – qualification, justification, differentiation and influence.</p> <ul style="list-style-type: none">• Four key questions in each of the four categories (the 4x4) determine whether you have met the criteria for having qualified the opportunity as genuine so that you do not waste time. You have justified from your own perspective that it is worth committing effort, time and resource to win. That you have a well-constructed and differentiated value proposition to beat the competition and that you are targeting the right people to influence in your sales campaign. (Remember the option for your prospect to 'do nothing' can be considered as a competitor).• Evidence is required that confirms you meet the criteria for answering each question positively.• The objective is to answer and satisfy each question with evidence and turn the question status indicator green. Your manager and sales team can contribute to the process via the question comments facility helping to ensure the evidence does really satisfy the question.• Depending on the status of the question you set tasks for yourself and team to gather the required evidence and bring the plan to life. The process will help you gather the information required to put yourself in a winning position in the opportunity. The question status can be set to one of five colour settings: <ul style="list-style-type: none">■ Grey You have not determined the required actions yet.▶ Amber You have defined tasks but have not yet satisfied the criteria.✓ Green You have satisfied the criteria.✗ Red There is a block or shortfall requiring attention.📢 Violet The question status has been challenged by review. <ul style="list-style-type: none">• Remember your manager will review and possibly challenge the status. This turns the status to violet. You will be required to respond to the comments from your manager.



4x4 Questions

Steps in the Process

1. Document in the 'Evidence' box what you know concerning the criteria to answer the question and provide evidence that this is true. (Evidence should be in the form of triangulated opinions, witnessed behaviour or written comment. Equally this could be a transcript from an email or even public domain information from a website or white paper).
2. Evaluate whether the evidence supports that you have met the 'Criteria to achieve green' and record your status using the simple colour indicators as above.
3. At any time your manager, or anyone involved in the opportunity can comment and challenge the status by adding an entry in the "Comments Box". You are notified of outstanding comments by the loudhailer icon and after consideration can reply. In this way a review of the validity of the evidence and best course of action in your sales process can be agreed with your team. Tasks can be set at any time and for any team member to address outstanding or changed actions. These outstanding actions build the elements of your **Plan2Close**.
4. Having evaluated your status decide on the tasks you wish to set regarding the specific question. If the status is grey you are likely to set tasks to gain the information necessary to make a judgement. If it is red, you need to set tasks to gain a positive outcome that helps you achieve green. If it is amber, you need to continue gathering the evidence required to turn the status green. If it is green, you might think you have achieved all you need, or you might want to set tasks to ensure the right people in the prospect are aware of your strengths in the specific area.
5. By setting tasks for yourself and members of the virtual team needed for you to achieve your objective, you can orchestrate and control the activities required to win the business.

Considerations

- You may decide that your evidence indicates you cannot reach a positive outcome. This does not necessarily preclude you from the bid, but it will mean you need to carefully consider your options and only proceed if you are confident that you can overcome a shortfall with strengths in other areas.
- On review, by yourself or your manager you can decide if the evidence plus outstanding tasks will enable you to overcome any issues and reach your objective. If you feel it will not, you will need to decide if other tasks are required and if, even with these additional tasks you feel you cannot reach a positive outcome then you should consider qualifying out of the opportunity.
- You should always remember that whilst the first objective of a good salesperson is to win the deal, the worst sales outcome is coming second; spending time and resource on lost causes is the greatest drain on sales performance.
- If you have gathered appropriate evidence that indicates a negative outcome the best sales teams are those brave enough to follow the evidence, qualify out and invest their time and resource on winnable opportunities elsewhere.



4x4 Questions

P2C Questions

1	Business Drivers	Qualification	Value to us
2	Business Responses		
3	Purchasing Process		
4	Pain or Gain Objective		
5	Client Competency	Justification	
6	Short-term Revenue		
7	Ability to Respond		
8	Strategic Value		
9	Buying Criteria	Differentiation	Value to customer
10	Alignment		
11	Competitive Differentiation		
12	Strategy		
13	Visibility/Credibility	Influence	
14	Personal Insight		
15	Political Insight		
16	Positioning		



Qualification

1. Business Drivers	
Question	What are the business reasons driving the prospect to act?
Objective	To identify the tangible reasons (business drivers) why the prospect needs your products/services? <ul style="list-style-type: none">• external forces on their business (e.g., Market/Competition).• internal forces on their business (e.g., Operational/Financial).
 Criteria	<ol style="list-style-type: none">1. Evidence that the business drivers have a fundamental effect on the success of the organization.2. Evidence the business drivers are acknowledged by the prospect.3. Evidence your products/services address these drivers quantifiably.
Examples	<p><i>External:</i></p> <ul style="list-style-type: none">• Market declining due to economic factors causing a sales decline.• New competition with new technology/service is taking market share.• A recent merger or acquisition has presented new and differing market opportunities. <p><i>Internal:</i></p> <ul style="list-style-type: none">• Not keeping pace with growth – systems are struggling.• Re-structuring causing changing business processes.
Considerations	<ul style="list-style-type: none">• There may be one or multiple business drivers/pressures – in addition to speaking with the customer, research information from their internal annual accounts, the Internet and financial or trade press to uncover their business position and pressures.• Are the Business Drivers real and can your solution or service have a quantifiable effect in supporting those drivers? Is there really an opportunity?



Qualification

2. Business Responses	
Question	Has the client/prospect initiated a formal response to address the business drivers?
Objective	<p>To establish the prospect is serious and committing business resources to address the business pressure(s).</p> <ul style="list-style-type: none">• Has a project has been sponsored to evaluate solutions to the business pressures?• Which named individuals have been tasked with evaluating responses/solutions to the business pressures? (If you are using OrgChartPlus, ensure that these stakeholders are added and mapped accordingly).
 Criteria	<ol style="list-style-type: none">1. Evidence the prospect is engaged in initiatives to address the Business Drivers2. Strong indications that your products/services support these initiatives
Examples	<p><i>External:</i></p> <ul style="list-style-type: none">• Acquiring another business to establish market share and economies of scale.• Restructuring the business to address market changes. <p><i>Internal:</i></p> <ul style="list-style-type: none">• Evaluating MIS systems in support of NEW business processes.• Developing skills to support a changed agenda.
Considerations	<ul style="list-style-type: none">• If the responses don't address the Business Drivers why are they exploring solutions?• Are they time wasting?



Qualification

3. Purchasing Process	
Question	Is there a formal purchasing process and do you understand what it is and who is involved?
Objective	<p>To determine if a sufficient budget for your solution has been allocated and you know the purchasing process.</p> <ul style="list-style-type: none">• To identify who is involved in deciding which supplier they will select.• To determine what practical steps are involved in the decision-making process.• To determine what triggers a move from one stage of the purchasing process to the next.• Uncover any evidence of previous purchasing commitments being vetoed unexpectedly and why.
✓ Criteria	<ol style="list-style-type: none">1. That a sufficient budget has been allocated.2. Knowledge of the budget planning process and timing.3. Knowledge of the budget release process and sign-off procedure.4. Knowledge of the people and roles involved. (If you are using OrgChartPlus then ensure that these are added and mapped accordingly.)
Examples	<ul style="list-style-type: none">• Budget set at \$xxx and confirmed by relevant authority.• Manager makes recommendations to director who then seeks sign off by board.• Evaluation project team appointed with allocated roles.• RFP issued with detailed time plan and contract process.
Considerations	<ul style="list-style-type: none">• Do we anticipate any issues on pricing and our ability to achieve an acceptable margin?• Will this be a standard deal? If not, have you gained the appropriate internal approval, support and resource?• Does the short-term revenue justify the time and cost of bidding?• Are you talking to the right people and are they listed on your organisation chart (OCP)?



Qualification

4. Pain or Gain Objective?	
Question	What are the compelling reasons for the prospect to do something by a specific time?
Objective	<p>To uncover clear and explicit indications that they must implement your solution by a set time:</p> <ul style="list-style-type: none">• Determine the consequences if they do not act by a specific time and what pain or potential gain will they fail to realise.• Determine what we can do to help the prospect understand the importance of the project and timing.
✓ Criteria	<ol style="list-style-type: none">1. Explicit demonstration by the prospect that there is a compelling, time specific event and that the consequences of non-delivery/achievement of success will have significant, quantifiable impact.
Examples	<ul style="list-style-type: none">• Must reduce operating costs by 10% by end of year or redundancies will follow.• New offices opening and if new systems are not in place, then offices will be inoperable.
Considerations	<ul style="list-style-type: none">• Personal pain/gain of individuals eg. Promotion/demotion/redundancy/credibility.• If there is no compelling event can you create one?• Is this a business-critical issue or a nice to have?



Justification

5. Client Competency	
Question	Provide evidence the prospect can manage the decision and the implementation of the solution.
Objective	<p>To ensure the prospect has the skills and levels of resource to successfully project manage the decision and the implementation of any solution. If not:</p> <ul style="list-style-type: none">• Determine the additional resource you will need to supply and the subsequent cost.• To ensure you have management authority to commit that resource.
✓ Criteria	<ol style="list-style-type: none">1. Confirm the client has the resources required to manage both the decision and the implementation.2. Evaluate any support resource that you will have to provide and that the prospect has budget for it.3. Agreement with your management that the above costs are acceptable.
Example	<ul style="list-style-type: none">• Complex solution – prospect has limited internal resource – require project support – can we sell this service to them?
Considerations	<ul style="list-style-type: none">• Can you partner with a third party to fill the skills gaps?• Carefully balance any risk against reward if you need to provide extra resource at your cost.



Justification

6. Short Term Revenue	
Question	What is the short-term revenue opportunity and is it worth the resource, time and effort required to win it?
Objective	To determine if you make enough money in the short term to justify investment in the sales cycle or if not, consider if the strategic value or future revenue streams justify the investment.
 Criteria	<ol style="list-style-type: none">1. Revenue from this deal should be equivalent to or above the minimum considered to be acceptable by your business and the timeframe is acceptable, relative to other opportunities calling for the same resources and time.
Examples	<ul style="list-style-type: none">• Short term revenue of \$xxx to be realised in 3 months.• Short term revenue does not support the investment, but a win would be a significant entry in a new industry segment/customer or product range.
Considerations	<ul style="list-style-type: none">• What are the key financial metrics: TCV, margin, payback, Capex, install, IRR%, NPV and contract term?• What is the current contractual relationship? Are there any other relevant terms we need to be aware of?• Does the deal open a new market/industry/customer/product range?



Justification

7. Ability to Respond	
Question	What time, competence, and resource are needed to win the business and is it worth it?
Objective	Determine that you can put together a suitable bid and if anything is likely to delay/jeopardise your response in terms of responding to requests, RFP's, pricing and having time/resources to build the necessary relationships
✓ Criteria	<ol style="list-style-type: none">1. You have time and resources to meet any reasonable response deadlines set by the prospect.2. The costs of meeting the deadlines are acceptable for this type of deal and customer.3. Any costs that do exceed those regarded as normal are approved.4. You are not compromising our professionalism by lack of time to deliver a good job.5. You have access to the skills and resources needed to respond and deliver professionally.
Examples	<ul style="list-style-type: none">• You have confirmation from all those needed that they can respond in time.• You have time to fully qualify the opportunity with senior decision makers before committing resource.• You have all required approvals.• We have access to a specialist resource to address a specific requirement.
Considerations	<ul style="list-style-type: none">• Have you asked the prospect for more time if you need it to deliver a professional response?• Have you engaged bid/support resources to meet the deadlines imposed by the prospect?• Do we have agreement with any partners required in meeting response timescales?• Have you qualified why the timescales are what they are? Is this a test?• Do you have any required approvals to proceed?• What are the consequences of a No Bid?



Justification

8. Strategic Value	
Question	What is the strategic value that justifies bidding for the business?
Objective	Determine the strategic value and future revenue to be gained from winning this opportunity.
✓ Criteria	<ol style="list-style-type: none">1. There is significant revenue within an acceptable timeframe for you and your management <i>and/or</i>2. This is a highly significant “flagship” customer whose market visibility is likely to attract further revenue from similar businesses supported by references. <i>and/or</i>3. This the first deal of its kind and you will learn how to address similar customers/markets.
Examples	<ul style="list-style-type: none">• Strategic Value – entry point to a new market/vertical.• Future Revenue – other opportunities from this prospect or others in the pipeline will be supported by successful visibility of this deal.
Considerations	<ul style="list-style-type: none">• If short term revenue is insufficient and there is insufficient future revenue or strategic value in pursuing this opportunity think hard before committing any resources.• Would this make a good reference story? Have we gained agreement for the prospect to provide approval for publicity? Have they made similar PR arrangements before?



Differentiation

9. Buying Criteria	
Question	What are the formal and informal buying criteria, and can you articulate them?
Objective	<p>Confirm the prospect's formal and informal buying criteria that will be used to judge suppliers.</p> <ul style="list-style-type: none">• Formal: RFP/RFQ – agendas/objectives of presentations, written specification etc for required solution and support systems, price, SLA standards.• Informal: Previous buying patterns, personal confidence, values, opinion of influential people, culture, values etc.• Determine the relative importance that the prospect puts on each of the criteria.
✓ Criteria	<ol style="list-style-type: none">1. Discover and verify both formal and informal buying criteria of the key decision makers.2. Understand the relative importance the key decision makers put on each of the criteria.3. Determine how we rank against these criteria and in respect to your competition.
Examples	<ul style="list-style-type: none">• Formal: Reduce costs by \$xxx; high resilience levels; SLA (looking for 2-hour response time); account management; looking for dedicated support team.• Informal: Assist individuals to achieve personal goals; trust that supplier will deliver what they say; prospect wants to be seen as a hero; they have deadlines to meet.• Are you the type of organisation the prospect normally buys from? (e.g. established/safe verses dynamic)• Are particular features of the solution key to the purchase decision (e.g. fulfilling a specific requirement)
Considerations	<ul style="list-style-type: none">• Understand from the prospect how the competition is perceived.• Are there specific criteria that is the key to winning the business?• 'Doing nothing' should be considered in the same vein as a competitor and therefor the implications and costs associated with doing nothing should be considered.



Differentiation

10. Alignment	
Question	Demonstrate the value you believe will convince the prospect that you would be a fitting business partner.
Objective	<p>To demonstrate alignment by highlighting that there is a good fit between your organization and the prospect. This is normally achieved by proving your value in the following areas:</p> <ul style="list-style-type: none">• Expertise (do you add value in terms of the knowledge you bring?).• Culture (what type of supplier are they comfortable with/is there a style match?).• Values (how they behave and what they expect - published or observed).• Processes (how you both do business/SLAs/operational support/trust).
✓ Criteria	<ol style="list-style-type: none">1. Uncover the expectations of the client in respect of value received during the sales cycle in terms of the people we deploy, the knowledge and expertise we bring and our attitude.2. Evidence the prospect values our capabilities and the characteristics/manner we display.
Examples	<ul style="list-style-type: none">• The prospect values speed of response. We exploit this by delivering quicker than the competition.• This prospect is "hi-tech" in terms of style and systems and our solution or company image match this.• The prospect held trust as a key criterion. We ensured our manner and responses were irreproachable.
Considerations	<ul style="list-style-type: none">• Understand the prospect key players and how each value differing factors.• Remember you are being ranked against the competition; qualify how you perform against them.• Is there a specific criterion that is the key to winning the business?



Differentiation

11. Competitive Differentiation	
Question	Show you have a differentiated value proposition that addresses the buying criteria and positions you to win.
Objective	<p>To build as strong (relative to the buying criteria) and as differentiated a value proposition as possible that addresses the buying criteria and other (stated and non-stated) critical needs of the prospect).</p> <ul style="list-style-type: none">• Have you articulated your Value Proposition in the prospect's terms, and have they accepted this?• To differentiate yourself from and elevate your position above the competition.
✓ Criteria	<ol style="list-style-type: none">1. Your value proposition delivers the benefits required, addresses the key drivers, and highlights your main strengths.2. Your offer is differentiated and aimed at the critical needs, especially those that have resonating focus (areas of benefit that are key to the prospect and can be substantiated).
Example	<ul style="list-style-type: none">• Frame your value proposition in the following manner: "You will be able to deploy a world class sales practice to gain market share through improved sales conversion rates and increase gross profit by using Plan2Close which is native to Salesforce.com and increases sales teams' adoption because of its easy-to-use framework of excellence that enables the iterative process of selling."
Considerations	<ul style="list-style-type: none">• Do we know where we have delivered value of this type before with this client?• Have we been successful with similar bids with different clients?• What have we learned from similar bids?



Differentiation

12. Strategy	
Question	Describe your sales strategy to win the business?
Objective	<p>To determine a strategy and time plan that provides the optimum chance to win? There are 5 acknowledged strategy approaches:</p> <ul style="list-style-type: none">• Direct. (Head on against the specified buying criteria of the prospect).• Indirect. (Changing the goal posts by seeking to influence the criteria).• Fragment. (Co-exist with competitor or establish a beachhead and expand).• Partner. (Join forces with a competitor).• Defer. (Delay the decision to give time to change/influence the buying criteria).
 Criteria	<ol style="list-style-type: none">1. Evidence you understand your strengths and weaknesses.2. Evidence you understand the competition's strengths and weaknesses.3. Evidence you have an agreed sales strategy supported by evidence from the prospect.4. Evidence the timing for making your bid given the proximity to the pain/gain objective.5. You have matched your sales strategy to the prospects buying cycle/process.
Examples	<ul style="list-style-type: none">• Direct – our relative performance against the buying criteria is better than the competition.• Indirect – we are generally weak against the buying criteria but significantly stronger in another area or areas.• Fragment – we cannot satisfy the total requirements of the prospect but can satisfy a component better than the competition and restrict our bid to that requirement.• Partner – our weaknesses are complemented by a competitor and vice versa.• Defer – our bid is inferior but will be stronger with further investment of time and resource consequently you should delay.
Considerations	<ul style="list-style-type: none">• Are we aware of and in line with the prospect's buying cycle/process? Do not engage too early or too late.• Have we fully considered our competitors likely strategy and current actions?



Influence

13. Visibility / Credibility	
Question	How well are you known by the key players in the prospect and what credibility do we have to affect the decision?
Objective	To ensure all prospect key players are fully aware of your capabilities, potential and value in respect of the proposed business..
✓ Criteria	<ol style="list-style-type: none">1. Show you are well known and respected throughout the 'decision tree' relating to this opportunity.2. If there are reputation or awareness/education issues to address, is there a plan to address them?3. Show the prospect is aware of the "value add" of your proposed solution, including past value delivered by you to the client and to others in their industry sector.
Examples	<ul style="list-style-type: none">• Key decision makers worked with us before – no issues and commended us on our response to their issues.• Key influencers previously had issues with us – but we have a plan to address this (maybe by a third-party reference)
Considerations	<ul style="list-style-type: none">• Do we have a track record for previous deals we have bid with this prospect?• Can we reference other successful bids in the same industry/functional area?• Have you recorded all relevant relationships and influences/issues in OrgChartPlus?



Influence

14. Personal Insight	
Question	Show your understanding of the key players' awareness, agenda, and feelings?
Objectives	<ul style="list-style-type: none">• To gain intelligence, via triangulation of key players' awareness, agenda feelings and personal goals.• To determine who has what role in the decision-making process and who really decides and who influences them.• To determine if you can help each key player achieve their key goals through the value offered by your solution.
✓ Criteria	<ol style="list-style-type: none">1. We are closely connected to at least one influential player and we can help them achieve their own key goals and those of their organization. Ideally engage the key decision maker (economic buyer) as a coach.
Examples	<ul style="list-style-type: none">• A key influential player expressing the need to be seen as a hero – i.e., to be seen to reduce costs by \$xxx and supports your solution to achieve this.• Your coach confirms 2 key decision makers respect your advice and have acted upon it.• Key decision makers have acknowledged value from you during the sales process and actively seek your opinion.
Considerations	<ul style="list-style-type: none">• The best coach is the main decision maker (economic buyer) securing this makes the deal almost certain.• Triangulate information to verify what you are told. You cannot have too many coaches!• Have you got all the relationships and nuances recorded in OrgChartPlus and recorded and understood their contact roles?• If you have enabled the relationship score in OrgChartPlus then this will determine to what level relevant stakeholders are supportive of you.



Influence

15. Political Insight	
Question	Articulate the non-formal as well as the formal decision-making process and the key influences.
Objective	<p>To determine how the decisions are influenced politically.</p> <ul style="list-style-type: none">• Determine whether the formal decision-making process is how the decision will really be made.• Identify the true power structure – not just in this specific project, but generally.• Uncover who influences whom.
✓ Criteria	<ol style="list-style-type: none">1. Understand and confirm all formal and informal relationships.2. We are closely connected with at least two key players.
Examples	<ul style="list-style-type: none">• Their CIO used to work with the CEO in a previous company and has a strong positive relationship. We know the CIO who whilst not involved in this project agrees to reference the benefits we bring to the CEO.• CEO is close to an external consultant who has worked with our company in assignments with other companies and is aware of past value we have delivered.
Considerations	<ul style="list-style-type: none">• Use OrgChartPlus to discover any 3rd party relationships and influencers – who we relate to.• Remember seemingly junior players can sometimes greatly influence their seniors.• Work closely with your customer coach to understand the influence levels and opinions of key stakeholders.



Influence

16. Positioning	
Question	How well is your virtual team positioned with the key influencers and decision makers and are you using these relationships to influence and win the opportunity?
Objective	<p>To leverage the network of your virtual team with the prospect's representatives to influence key decision makers and gain support for your solution and ease subsequent deal conclusion.</p> <ul style="list-style-type: none">• Ensure your coach promotes you as a 'trusted advisor' to key influencers in the decision.• Use your relationships to create awareness in key influencers of your strengths and your competitors' weaknesses.
 Criteria	<ol style="list-style-type: none">1. Your internal sponsors are advocating our value to key decision makers.2. Informal influencers are lobbying people in their network with regard the benefits of your solution.3. Marry your team contacts with the prospects to broaden their trust and value in your company.
Examples	<ul style="list-style-type: none">• You are meeting key influencers because of internal reference and introductions.• Key players are providing you with information on competition.• Your broader team is matching the prospects (e.g. your FD now speaks directly to their FD).
Considerations	<ul style="list-style-type: none">• Do we have the appropriate internal (to us) executive sponsors engaged?• It is the role of the sales lead to position and exploit all mapped relationships.• Use OrgChartPlus to record and plan all inter team connections and relationships to help understand and uncover all pieces of the relationship puzzle.

Thank you for reading this

For any questions or further support on using **Plan2Close**, please go to <https://salesmethods.com/support/> and complete the form.

