



QUALIFYING WITH IMPACCT

Advanced Opportunity Qualification for complex B2B sales

01

Why Bother Qualifying?

The quality and accuracy of opportunity qualification is widely acknowledged to be one of the **key predictors** of future sales success - and a critical differentiator between the best salespeople and the rest.

Today's top B2B salespeople have **far too much respect for their own time** to waste it on "opportunities" they have little or no chance of closing - while their less-effective colleagues are often tempted to hold on to dead or dying opportunities like a shipwrecked sailor desperately clinging on to a piece of driftwood.

When we analyze relative sales performance, the benefits are obvious: the additional time and effort that top salespeople invest in qualification is more than repaid in terms of **shorter sales cycles**, greater **average deal values** and **higher win rates**.

Sales leaders that have implemented consistent opportunity qualification protocols see similar benefits across their entire sales organization, together with **dramatically improved revenue predictability** and **forecast accuracy**.

This practical guide - drawn from the experiences of some of today's most effective B2B sales organizations - seeks to show you how to implement a **consistent, robust, and scalable** approach to opportunity qualification across your own sales organization that will inevitably improve sales outcomes and bring confidence and consistency to your revenue forecasts.

02

Universal Principles

Regardless of which qualification methodology you choose to apply in your sales organization, we believe that four key principles need to be applied:

- **First**, opportunity qualification must be managed as a **continuous process** rather than a one-off event
- **Second**, similar types of opportunities must be qualified according to the same **consistent rules**
- **Third**, salespeople need to be **completely honest** with themselves and with their managers when assessing the status of every opportunity
- **Fourth**, and closely related to the previous principle, salespeople must **avoid** making **unverified assumptions** about any of the qualification criteria

Let's explore each of these in more detail...

1: Qualification must be a continuous process

In complex B2B sales environments opportunity qualification must be managed as a continuous process, for a number of reasons:

- It is usually impossible to completely and accurately qualify any complex opportunity in a single session
- Some key aspects of the qualification criteria are likely to be initially **unknown** or **unproven** to the salesperson
- It is highly likely that some aspects of the customer's circumstances will **change** during the course of a lengthy buying journey
- The initial assessment of a number of the qualification factors will probably need to be **verified** through further investigation or dialogue

We strongly recommend that every active opportunity is **requalified regularly**, and in particular prior to advancing to the next stage of the pipeline or whenever circumstances change.

2: Qualification must be consistent

Whilst there is often a case to be made for different standards of qualification to be applied to different types of opportunity - for example, the qualification of a large net new opportunity with an organization that is not currently a customer typically needs to be more rigorous than that of a relatively small upgrade to an existing project with an existing customer - but every opportunity of the same type must always be qualified to the **same consistent standard**.

This also means that every salesperson must be required to qualify every opportunity of a given type in the **same consistent way** as every other member of the sales team - using the same parameters, applying the same standards, and with the same rigor.

3: Honesty is paramount

Salespeople need to be brutally honest with both themselves and their managers when qualifying sales opportunities. There's **no point** in **fooling themselves** or anyone else - any attempt to “paper over the cracks” or to ignore evidence of the true status of an opportunity will inevitably come back to haunt them.

4: Assumptions kill opportunities

Unverified assumptions create **unjustifiably positive projections** about the chances of success, and they blindside the salesperson into believing they are doing well when they are not. They prevent salespeople from uncovering issues that - if acknowledged - could have been dealt with before they did serious harm.

By the time the false assumption has been uncovered, it's often too late to do anything about it. The golden rule is “**if you don't know, don't guess**”. It is far better to acknowledge and admit that a qualification factor is currently unknown or uncertain than to make a dangerous and unjustified assumption.

Principles + process = effective qualification

If it is to be effective, sales opportunity qualification must be continuous, consistent, honest and free from assumptions, and it must be implemented as a **clearly defined** and **universally adopted** process.

In fact, we'd go further: accurate qualification is so important to the interests of the organization that any **persistent failure** to embrace both the principle and the process, if it cannot be remedied through coaching, should result in disciplinary action.

03

A Brief History of Opportunity Qualification

BANT

The earliest attempt to implement a disciplined approach to B2B sales opportunity qualification came from IBM, with their **BANT** framework. Despite its limitations, it is still used in some traditional sales organizations today.

BANT focuses on four key questions:

- **Budget:** Does the prospect have a budget and if so, how much?
- **Authority:** Do we have access to the decision-maker?
- **Need:** Does the prospect have a clearly articulated business need?
- **Timeframe:** When does the prospect intend to implement a solution?

Whilst all significant sales opportunities are likely to satisfy all four tests at **some point** in their development, relying on BANT as the primary means of qualification has serious flaws in today's complex B2B buying environments.

BANT might appear to be an appropriate means of qualification for familiar, repeat purchases (for example when a customer is buying a new batch of the same goods) but it is **far less effective** in complex B2B environments where the prospect is involved in an unfamiliar and often discretionary purchase that involves a significant amount of research.

The BANT parameters imply that salespeople should seek out formally defined, actively funded projects. But by the time a potential new project is fully "BANT qualified", today's typical prospective customer will already be a long way into their **decision-making journey**. They will have already researched their options and have started to form their opinions.

BANT also assumes that there is a single decision-maker - but Gartner's latest research demonstrates that there are 10 or more significant stakeholders in the typical complex B2B buying journey. It's clear that a literal implementation of BANT is a **dangerously over-simplistic approach** to qualifying today's complex B2B sales opportunities.

Given that other research by Forrester, Gartner, Challenger, Rain Group, and others has proven that salespeople who engage early with the prospect and help to shape their thinking have a far greater chance of winning than salespeople that engage later, the idea of rejecting leads that are not fully BANT qualified is **completely counterproductive**.

Enter MEDDICC

More recently, **MEDDICC** (and variations) has emerged as a widely adopted approach to opportunity qualification for technology-based businesses, particularly where companies are selling high-value solutions that involve complex buying journeys and which have the potential to drive transformational changes in the customer's organization.

The MEDDICC criteria represent a **step-function improvement** over BANT in identifying the key factors that enable salespeople and managers to accurately assess the quality of sales opportunities. Here's how the factors are typically defined:

- **Metrics** are the quantifiable measures of value that your solution can provide
- The **Economic Buyer** is the person with the overall authority in the buying decision
- **Decision Criteria** are used by the customer to decide between their solution options
- **Decision Process** is the series of steps that the prospect will follow when making a buying decision
- **Identify Pain** is about identifying the customer's issues that will cause them to take urgent action
- The **Champion** is an influential stakeholder who is prepared to promote our solution internally
- Our **Competition** are the other vendors competing for the project

Although widely deployed, and significantly more effective than BANT, MEDDICC is not without its own **limitations** - not least of which the sequence in which the elements are introduced does not reflect the typical order in which salespeople need to qualify these factors.

If literally and simplistically interpreted, the MEDDICC formula also fails to address **money** (the source of funding) or **timeframe**, urgency, and close date confidence - and it implies that there is only one **economic buyer** (less common in today's consensus-driven world), that one **champion** might be enough (more is often better), and that our **competition** typically comes from vendors like us (rather than all the other things competing for the same customer resources).

MEDDICC has important strengths and can act as the basis of an effective opportunity qualification framework.

But we believe that it is possible to do even better - and that's why we have pivoted from MEDDICC to **IMPACCT**...

Introducing IMPACCT

You can think of **IMPACCT** as a logical evolution of MEDDICC, focusing attention on the following factors in the following order:

Qualification Factor		Description
I	Issues and Implications	What are the prospect's key business issues, what are the implications, who is affected by them, and are the consequences sufficient to force them to take action?
M	Money and Economic Metrics	Has an appropriate budget been allocated and if not, is there an obvious source of funding - and what is the economic impact of the key business metrics?
P	Decision Process and Criteria	What are the prospect's decision and approval processes, what are their decision criteria - and are all of these clear and favorable to us?
A	Authority and Influence	Who are the key stakeholders and gatekeepers and what influence do they have over the decision - and who has the ultimate authority to approve the project?
C	Champions [Approach + Project]	Have we identified and engaged with powerful and effective internal champions who are willing and able to promote the project and our approach to the rest of the stakeholder group?
C	Competition - External + Internal	What alternative options are they considering, how do we stand against them, and what is the relative priority of this project vs. their other investment opportunities?
T	Timing and Urgency	How urgent is the project, when are they planning to make a decision, what is driving this, and how confident are we in this date?

As you can see, **IMPACCT** follows a **more logical sequence** than MEDDICC and also:

- Prioritizes the customer's **issues** and their **implications**, without which there will be no motivation to change
- Looks not only at **metrics** but also at **money**, and how the project will be funded
- Extends the focus on the economic buyer to include the concept of **ultimate authority**
- Recognizes that we may need to identify and engage with multiple **champions** if we are to win their business
- Acknowledges that our most significant **competition** may come from other projects (or "do nothing")
- Embeds **timing**, **urgency**, and **close date confidence** directly into the qualification process

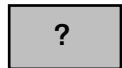
04

The Process of Qualification

We've already identified that qualification of complex B2B sales opportunities needs to be managed as a **continuous process**, rather than a one-off event. We also need to recognize that qualification is rarely absolute and typically cannot be simplified down to a series of "yes-no" answers.

A progressive, color-coded approach

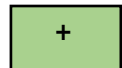
That's why - regardless of whether you adopt BANT, MEDDIC or IMPACCT - we recommend implementing a clearly-defined, **progressive**, evidence-based, color-coded approach when it comes to assessing each qualification factor:



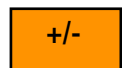
UNKNOWN: Every factor must **start** as "unknown" and **remain** in that status unless and until we have the **evidence** to prove otherwise



VERY POSITIVE: According to all the available evidence, we are currently in a very positive position regarding **all the elements** of this factor



SOMEWHAT POSITIVE: According to all the available evidence, we are currently in a generally positive but **not yet perfect** position regarding the elements of this factor



NEUTRAL: According all the available evidence, we are currently in a neutral position regarding this factor - **no better or worse** than their other leading options



SOMEWHAT NEGATIVE: According to all the available evidence, we are currently in a somewhat negative situation regarding this factor, but believe we can improve the situation



VERY NEGATIVE/HIGH RISK: According to all the available evidence, we are currently in a very negative situation and should seriously consider **disqualifying the opportunity...**

The default starting position for each qualification factor must always be “**unknown**” and it must **remain** in this state until and unless the salesperson has clear **evidence** to justify changing the status. If any factor remains “unknown” at an advanced stage of the sales cycle, this uncertainty may of itself amount to a red flag.

Depending on the nature of the project, a single “very negative/high risk” factor may be enough to **disqualify** the entire opportunity.

Late-stage opportunities that still have large numbers of “unknown” or any “very negative/high risk” factors must be subjected to particularly close **scrutiny**.

Assess and justify

We strongly recommend that you require salespeople to implement an “**assess and justify**” strategy: if the salesperson assesses any of the factors as anything other than “unknown”, they must be prepared - and in most circumstances should be required - to justify and document the reasons behind their conclusion.

Progressive qualifying

It should also be obvious that it is very unlikely that all the qualifying factors will be clear from the earliest interaction with the customer, and that some may only be capable of being assessed as the customer advances through their buying journey, but there are other factors where an initial judgement can and should be made - even if it is revised later, for example:

Customer phase = Exploring

While our customer is still in the initial exploring phase, we must pay particular attention to understanding the customer’s **issues** and their **implications**, the potential economic **metrics** and **money** (how the project might be funded) and whether our initial contact appears to be a potential **champion**.

We also need to determine whether this is an inevitable or a discretionary purchase, whether their buying journey is familiar or unfamiliar, what caused them to engage with us, and what stage they have reached in their own buying decision process.

Customer phase = Defining

In addition to requalifying the above factors, once the customer advances to the defining phase, the salesperson must also attempt to identify the key stakeholders and assess their **authority** and **influence**, to understand and if possible, to shape their **decision criteria** and **process** and try to cultivate multiple powerful **champions** within the stakeholder community.

We also need to understand what other options they may be considering (our “external **competition**”), and to establish the project’s **timing** and **urgency** as well as its’ relative priority compared to all the customer’s other potential investment opportunities (i.e., our “internal **competition**”).

Customer phase = Selecting

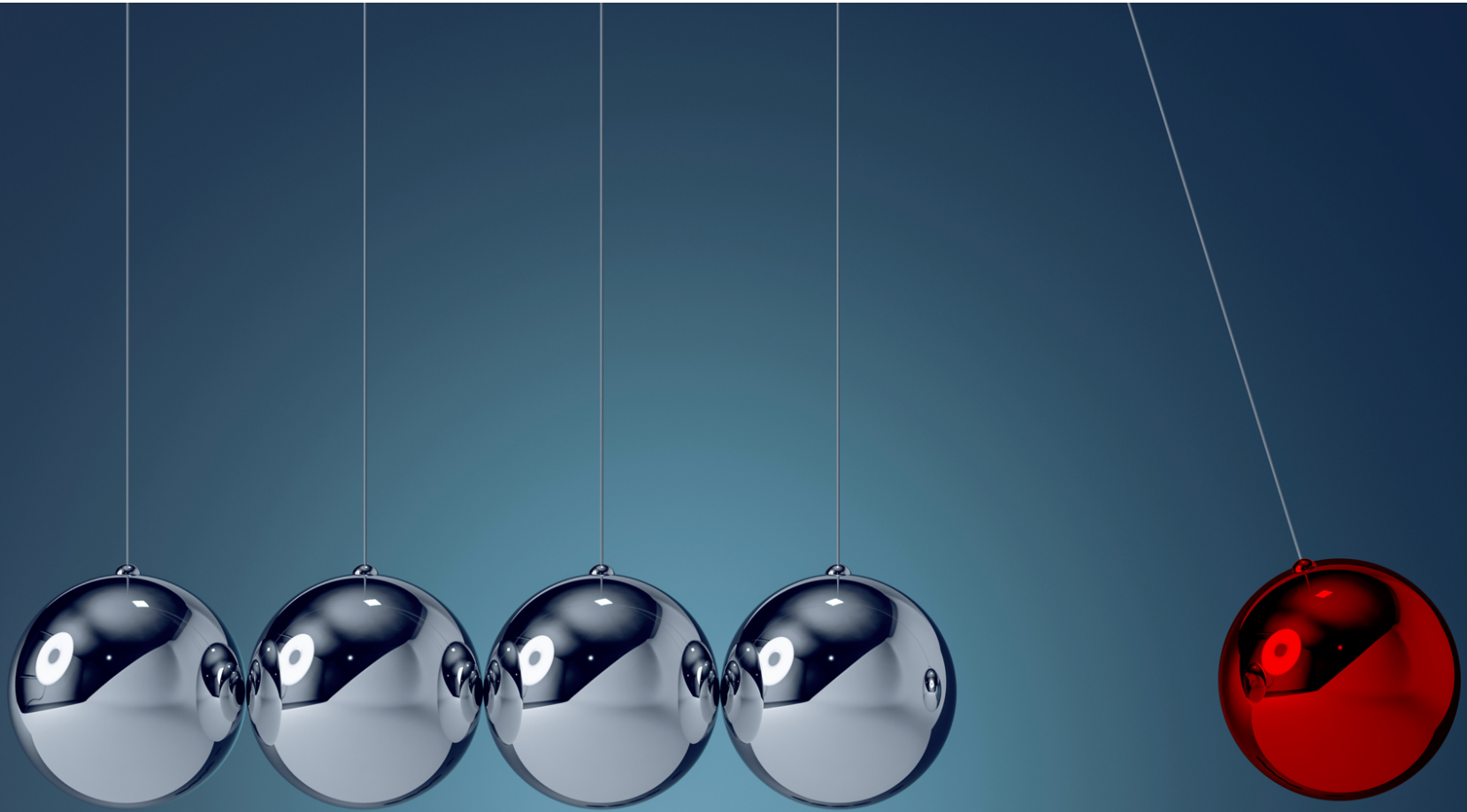
By this point in the journey, we must have sought to differentiate our approach - and the outcomes it drives - from all the other options the customer is considering. In addition to requalifying all the above factors, we also need to ensure we understand what happens after the customer has selected their preferred option - i.e., their approval **process**.

Customer phase = Verifying

In addition to requalifying all the IMPACCT factors, we must ensure that we have eliminated or at minimum significantly mitigated the stakeholder community’s individual and collective **Fears of Messing Up [FOMU]**. We must ensure that we are positioned as the least-risk of all their potential options - including “do nothing”.

Customer phase = Confirming

In this final phase prior to the **ultimate approver(s)** committing to the project, we must ensure that everyone concerned with the final sign-off of the project and our proposed approach shares the same positive perceptions as do the **champions** who have been promoting the project and our approach.



05

Qualifying with IMPACCT in your Organization

This section offers detailed guidelines for evaluating each of the 7 IMPACCT qualification factors, starting with your prospect's **business issues** and their **implications**...

These guidelines are inevitably somewhat generic, and you will probably want to customize, clarify, or expand upon them to reflect the specific way in which each factor needs to be interpreted in your typical sales environments...

I: Issues and Implications

What are our prospect's key business issues, what are the implications, who is affected by them, and are the consequences sufficiently serious to force them to take action?

Key Considerations

- Clear and significant business issues are always more likely to drive action than functional needs
- If we do no more than respond to their stated functional needs, we often end up with a weak business case
- We need to identify our prospect's highest-priority business issues and demonstrate that we have a track record of success in addressing them
- We need to fully explore and wherever possible develop the impact, implications, and consequences of these issues (i.e., the pain/gain)
- We need to understand who is affected and how they are affected - stakeholders, functions, and departments

Status

Considering all the available evidence, which of the following options best reflect the current status of this qualification factor?

Unknown: there is insufficient evidence to justify any of the other statuses

Very Positive [+ +]

They have a very significant business-critical issue, the implications are profound, key stakeholders are affected, and they will be forced to act

Somewhat Positive [+]

They have a significant business-critical issue and some but not all of the other considerations are clearly present, but it is not yet inevitable they will act

Neutral [+/-]

They have a potential business issue we could address, but their circumstances are such that they will probably need to take some persuasion to act

Somewhat Negative [-]

They appear to have a business issue we can address, but it is low down on their priority list and they can probably live with the status quo

Very Negative [- -]

They may have some functional needs, but it has proven impossible to identify or scope any underlying business issues, and it is very unlikely they will act

Here are some of the things we need to know in order to fully qualify this “**Issues and Implications**” factor:

- What issues is our prospective customer trying to address?
- Are they problems they want to fix, risks they want to avoid, or objectives they want to achieve?
- What is the impact of the issues, who is most seriously affected, and what are the implications?
- How have they previously tried to address the issue, and with what results?
- Why do they need to address the issue now?
- Are the consequences painful enough to ensure they take action?
- *You can probably think of some other important qualifying questions that apply to your specific markets*

Here is some important guidance to consider when qualifying **Issues and Implications**:

- This is normally the first factor that we need to qualify: if there is no issue, there is usually no opportunity
- We need to ensure that we can prove that we are really good at addressing their issues
- Clear business issues are far more likely to drive action than just functional needs
- If our current contact is only capable of discussing functional needs, we are probably talking to the wrong person
- We must resist the “itch to pitch” - we need to develop the issue and fully explore its impact and implications before we attempt to introduce our “solution”
- *You can probably think of some other important observations that apply to your specific markets*

Conclusions

Functional frustrations can cause prospects to identify and investigate potential solutions, but if they are not associated with a significant business issue that has serious implications, they are unlikely to justify a significant investment. We need to ensure that there is a clear connection between our prospect’s functional frustrations and their organization’s key business issues, initiatives, and priorities.

Chasing functional frustrations often leads to a dead end. If either the business issues or their implications are unclear, we must redouble our efforts to establish a clear and positive business case. If we cannot, we should seriously consider disqualifying the opportunity.

M: Money and Economic Metrics

Has an appropriate budget been allocated and if not, is there an obvious source of funding - and what is the economic impact of the key business metrics?

Key Considerations

- About 50% of all technology purchases start out without being formally budgeted - but if the business case is strong enough, the money will probably be found
- Budgeted projects with weak business cases are vulnerable, and often lose their funding to more compelling projects
- The ultimate approvers of any project expect to see clear and compelling economic metrics that drive strong ROI
- These ultimate approvers chose which projects to invest in based on their relative economic metrics
- Strong before/after economic metrics make a far more powerful case than functional performance improvement metrics by themselves

Status

Considering all the available evidence, which of the following options best reflect the current status of this qualification factor?

Unknown: there is insufficient evidence to justify any of the other statuses

Very Positive [+ +]

The project is fully budgeted, or a source of funding has been identified, and the economic metrics are so strong that action is inevitable

Somewhat Positive [+]

The project is either budgeted or a source of funding has been identified but whilst the economic metrics are strong they are not yet compelling

Neutral [+/-]

It is likely but not yet inevitable that the project will be funded, and the economic metrics look promising but need developing

Somewhat Negative [-]

It is possible that the project will be funded, but the economic metrics need a lot of work before the business case is strong enough

Very Negative [- -]

There is no evidence of budget and little possibility that this project will be funded in any predictable timeframe

Here are some of the things we need to know in order to fully qualify this “**Money and Economic Metrics**” factor:

- Has the project been budgeted and if so, how much has been allocated and is it sufficient?
- What are the negative economic consequences associated with continuing on their current path?
- What are the positive economic consequences associated with achieving their desired outcomes?
- Is the gap between these negative and positive consequences wide enough to justify the required investment?
- Does the projected return on investment meet our prospective customer's minimum project approval payback expectations?
- *You can probably think of some other important qualifying questions that apply to your specific markets*

Here is some important guidance to consider when qualifying **Money and Economic Metrics**:

- The presence of a budget is no guarantee that it will ultimately be spent on the project
- Even budgeted projects need to be justified using clear economic metrics
- If a project isn't budgeted, but can demonstrate compelling economic benefits, then the money will usually be found if the project has a strong enough executive sponsor
- Operational performance metrics are rarely enough by themselves - they need to be connected to compelling economic benefits that contribute to the organizations' key business goals
- *You can probably think of some other important observations that apply to your specific markets*

Conclusions

Our customers expect to see a positive return on investment on all of their projects. Even relatively small investments need to be supported by a clear and positive business case. Remember, we are competing for funding and resources against all the other projects that our customer could choose to invest in.

If either the funding or the economic metrics are unclear, we must redouble our efforts to establish a clear and positive business case. If we cannot, we should seriously consider disqualifying the opportunity.

P: Decision/Approval Process and Criteria

What are the prospect's decision and approval processes, what are their decision criteria - and are all of these clear and favorable to us?

Key Considerations

- If we can influence our prospect's decision criteria and process, we will increase our chances of winning
- We need to understand our prospect's decision criteria in order to accurately assess our chances of being selected
- We need to understand our prospect's decision process if we are to make any accurate assessment about how and when they will make their decision
- If the prospect seems uncertain or unsure about their likely decision process, this is a clear negative indicator
- We must be prepared to disqualify an opportunity if the decision process and criteria are clearly unfavourable and cannot be changed

Status

Considering all the available evidence, which of the following options best reflect the current status of this qualification factor?

Unknown: there is insufficient evidence to justify any of the other statuses				
Very Positive [+ +]	Somewhat Positive [+]	Neutral [+/-]	Somewhat Negative [-]	Very Negative [- -]
We understand their decision process and criteria in detail, we have strongly influenced their requirements, and they are very favourable to us	We have a reasonably good understanding of their decision process and criteria, and they are generally favourable to us	We have a reasonable understanding of their decision process and criteria, and they are broadly neutral - favouring neither us nor our competition	Despite repeated attempts, they have refused to or are unable to reveal their decision process or criteria, and we have no idea how we stand against them	They have revealed their decision process and criteria and either we cannot address them and/or they are very favourable to our competition

Here are some of the things we need to know in order to fully qualify this “**Decision/Approval Process and Criteria**” factor:

- What criteria will the customer use to decide whether the issue is worth addressing and, if so, how the project will be prioritized?
- What criteria will the customer use to decide which option to choose and which of these factors are most important in their decision?
- What are the prospect’s decision and approval processes, what are the key steps and timeframes, and who will be involved?
- To what extent have we been able to influence their process and criteria to our advantage?
- Taking everything into account, are these factors favorable or unfavorable to us?
- *You can probably think of some other important qualifying questions that apply to your specific markets*

Here is some important guidance to consider when qualifying **Decision/Approval Process and Criteria**:

- If the key stakeholders haven’t agreed on their decision criteria, they are likely to end up doing nothing
- If the key stakeholders are unfamiliar with their organization’s buying process, the chances of success are reduced
- We need to understand how they will decide whether to act, as well as how to choose their best option
- Our chances of winning their business are dramatically improved if we have been able to positively influence their decision process and criteria
- Conversely, if a competitor has influenced them, we will inevitably struggle to win the customer’s business
- *You can probably think of some other important observations that apply to your specific markets*

Conclusions

If we do not understand our prospect’s decision and approval processes and criteria, we will have no idea (or any influence over) how they will decide whether to proceed with the project, or which option to choose.

Our chances of winning their business will, of course, be very positively affected if we have managed to influence their thinking and behavior.

A: Authority and Influence

Who are the key stakeholders and gatekeepers and what influence do they have over the decision - and who has the ultimate authority to approve the project?

Key Considerations

- Most significant decisions are the result of a consensus between the most influential stakeholders and the ultimate approver(s)
- Today's typical complex buying decisions involve significant numbers (often 10+) of stakeholders
- The ultimate approver(s) are the ones who have the ultimate say over whether the project will go ahead, and typically are driven by the economics
- The different stakeholders and gatekeepers often start off with different perspectives and priorities
- We can rarely rely on one person - no matter how powerful - to drive the decision through in the absence of stakeholder alignment

Status

Considering all the available evidence, which of the following options best reflect the current status of this qualification factor?

Unknown: there is insufficient evidence to justify any of the other statuses

Very Positive [+ +]

We have identified and engaged the most influential stakeholders and ultimate approver(s), and they are highly supportive of the project and our approach

Somewhat Positive [+]

We have identified and engaged the key stakeholders and ultimate approver(s) and have a generally positive relationship with them

Neutral [+/-]

We have identified and engaged key stakeholders, and they are generally positive, but we have not yet managed to engage the ultimate approver(s)

Somewhat Negative [-]

We have some stakeholder contact, but need to engage more of them, and we have no current contact with the ultimate approvers(s)

Very Negative [- -]

We're struggling to identify and reach the key stakeholders, let alone the ultimate approver(s)

Here are some of the things we need to know in order to fully qualify this “**Authority and Influence**” factor:

- Who are the key stakeholders in the decision, and what are their respective perspectives, role, influence, attitudes, and accessibility?
- What are the underlying dynamics of the relationship between the various stakeholders?
- Do any of the gatekeepers have the power to delay or even veto the project?
- Who has the ultimate approval authority over whether the project goes ahead or not?
- What are the factors that are most important to them?
- Who do the ultimate approver(s) rely on for advice when making their final decision?
- *You can probably think of some other important qualifying questions that apply to your specific markets*

Here is some important guidance to consider when qualifying **Authority and Influence**:

- We need to find out who has been involved in similar previous decisions
- If we’ve identified fewer than the typical number of stakeholders, some are probably missing
- We need to ensure we’ve identified all the significant stakeholders - including the typical potential “gatekeepers” like HR, Compliance, IT security, and so on
- We need to work out where the real (hard and soft) power actually lies
- *You can probably think of some other important observations that apply to your specific markets*

Conclusions

We will inevitably operate at a significant disadvantage if we have failed to identify, engage, and assess the key stakeholders in our prospect’s decision and approval processes, and in particular if we have weak or non-existent relationships with the key gatekeepers, executive sponsor and/or ultimate approver(s).

It is particularly important that we establish multiple lines of contact with our prospect: relaying on a single point of contact in any complex decision-making environment is an extremely risky strategy, no matter how powerful or influential they may appear to be.

C: Champion(s) [Approach and Project]

Have we identified and engaged with powerful internal champions who are willing and able to promote both the project and our approach to the rest of the stakeholder group?

Key Considerations

- A coach might share valuable information with us, but committed champions will go beyond this to actively promote our approach to their fellow stakeholders
- Effective champions have the potential to powerfully amplify our own sales efforts - and to reach stakeholders that we might not be able to engage directly
- We must avoid confusing enthusiasm with influence - if they are to be effective, “champions” must not only be fans, but also willing and able to persuade their fellow stakeholders
- If we can't find/create an effective champion, we won't have anyone selling internally on our behalf, and our ability to get our message across will be restricted
- If the project doesn't have a powerful champion, it may never happen - and if our approach does not have a powerful champion, we may never be chosen

Status

Considering all the available evidence, which of the following options best reflect the current status of this qualification factor?

Unknown: there is insufficient evidence to justify any of the other statuses

Very Positive [+ +]

We have identified and engaged one or more enthusiastic and influential internal champions who are prepared to go out of their way to support us

Somewhat Positive [+]

We have at least one enthusiastic internal champion who seems to be prepared to go out of their way to support us

Neutral [+/-]

We seem to have at least one enthusiastic internal champion, but we're not convinced about their influence on other stakeholders

Somewhat Negative [-]

Despite repeated attempts, we haven't yet managed to find anyone who is prepared to act as our internal champion

Very Negative [- -]

We can't find a champion, and one of our competitors is being powerfully and effectively championed

Here are some of the things we need to know in order to fully qualify this “**Champion(s)**” factor:

- Does our initial contact have the potential to become an effective internal champion?
- What is their role in and influence over the decision and approval processes - and how are they regarded by the other stakeholders?
- Are there other stakeholders who also have the potential to become effective internal champions?
- Are we confident that the person we have identified as our most likely champion will be willing to stick their neck out to promote us internally?
- *You can probably think of some other important qualifying questions that apply to your specific markets*

Here is some important guidance to consider when qualifying potential **Champions**:

- Having an effective internal champion can significantly increase our chances of winning the customer’s business
- Having multiple internal champions is even more powerful
- Enthusiasm doesn’t always equate to influence - we need to avoid getting carried away by an apparent champion’s positive reaction
- We may need to coach our champion in how to most effectively influence their fellow stakeholders
- We need to anticipate and address our champion’s potential Fear of Messing Up (FOMU)
- *You can probably think of some other important observations that apply to your specific markets*

Conclusions

Having a powerful and influential internal champion can significantly increase our chances of winning. But this isn’t just about championing our company, our offerings, and our approach: it’s also about championing the project itself in the face of internal competition for resources.

And we don’t have to (and shouldn’t) stop at finding one champion: having multiple champions can be even more powerful, particularly if between them they can exert a level of influence on the other stakeholders that no single individual could.

C: Competition (Options and Projects)

What alternative options are they considering, how do we stand against them, and what is the relative priority of this project vs. their other investment opportunities?

Key Considerations

- From the customer's perspective, our "competition" will often come from outside what we regard as the most obvious competing vendors in our own market
- We need to be able to understand what they regard as their other credible options if we are to most effectively differentiate our approach
- We also need to know how important this project is compared to the other projects that are competing for resources
- We need to defeat both our external and internal competitors

Status

Considering all the available evidence, which of the following options best reflect the current status of this qualification factor?

Unknown: there is insufficient evidence to justify any of the other statuses

Very Positive [+ +]

We have identified all their other options, the key stakeholders have told us they strongly prefer us, and that the project is a top priority

Somewhat Positive [+]

We have identified all their other options, the key stakeholders seem to prefer us, and the project is a high priority

Neutral [+/-]

The stakeholders regard us as an acceptable option, but others are still in the running and the project is competing for resources with other projects

Somewhat Negative [-]

Despite repeated attempts, we still don't have any clear idea about who or what we might be competing against (other options and other projects)

Very Negative [- -]

We have identified at least one other alternative option that appears to have a significant advantage and/or the project is a low priority

Here are some of the things we need to know in order to fully qualify this “**Competition**” factor:

- What other potential solution options is our customer likely to be considering?
- How does the customer believe we compare against them?
- What are the relative advantages and disadvantages of their other options?
- Have we been able to establish clear positive differentiation in the eyes of the customer?
- How does this project rank against their other investment priorities?
- *You can probably think of some other important qualifying questions that apply to your specific markets*

Here is some important guidance to consider when qualifying potential **Champions**:

- What we think about the competition/alternative options doesn't matter - what matters is what the customer thinks about them
- Comparing feature lists is far less effective than having a distinctively different theme
- Before we can credibly claim to be “better” than their other options, we first need to show how and why we have taken a different approach
- Our chances of success are amplified if we can associate this project with our customer's key corporate priorities and initiatives
- *You can probably think of some other important observations that apply to your specific markets*

Conclusions

Other opportunity qualification methodologies often seem to only think of the “competition” in terms of other similar vendors. But from our customer's perspective, their other options can also include significantly different approaches to solving the problem - such as employing more people, outsourcing the function, following a radically different path, or deciding they can live with the status quo.

All-too-often, our strongest “competition” will actually come from other apparently very different projects that are nevertheless competing for the same funding, management attention and other resources.

T: Timing and Urgency [Close Date Confidence]

How urgent is the project, when are they planning to make a decision, what is driving this, and how confident are we in this date?

Key Considerations

- Most CRM systems require us to enter a close date in order to create an opportunity, but often fail to record the basis for that close date
- The “close date” is the day on which we receive a bookable order (and not the day on which we are told we have been chosen)
- We must always seek to understand the reason why a customer suggests a potential close date - and we must be prepared to adjust that date if we believe the evidence is weak and the opportunity could slip
- Basing the close date on the salesperson’s hope rather than evidence from the customer is a primary reason why so many close dates are repeatedly missed

Status

Considering all the available evidence, which of the following options best reflect the current status of this qualification factor?

Unknown: there is insufficient evidence to justify any of the other statuses

THEY MUST ACT [+ +]

Our customer has revealed why they **MUST** make a decision and place an order by the currently projected close date

THEY WANT TO ACT [+/-]

The customer has explained why they **WANT** to make a decision and place an order by the currently projected close date, but this could slip

WE HOPE THEY WILL ACT [- -]

We **HOPE** that the customer will make a decision and place an order by the close date - but without any evidence that the customer has a truly compelling event

There is one key thing we need to know in order to accurately qualify this “**Timing and Urgency**” factor: what is the close date currently based on?

- A verified and genuinely compelling event which means that our customer **MUST** make a commitment no later than the currently projected close date
- Our customer’s confirmation that they **WANT** to make a commitment no later than the currently projected close date - but either they or we recognize that this date could slip
- Our **HOPE** that the opportunity could be closed by this date - but without any auditable confirmation or verification from the customer

Truly “compelling events” are rare: many of the things that salespeople imagine are “compelling events” actually aren’t - it often turns out that the customer could actually afford to delay

Here is some important guidance to consider when qualifying **Timing and Urgency**:

- If - in the absence of firm evidence - our close date is initially based on “hope”, we must always aim to be conservative rather than optimistic
- We must be cautious about identifying events as “compelling” if they aren’t inevitably going to result in action
- Offering our customer a time-based discount does not by itself qualify as a “compelling event”
- We must always seek out evidence to justify our projected close date
- Repeatedly missing or moving a close date is usually the result of poor qualification
- *You can probably think of some other important observations that apply to your specific markets*

Conclusions

Close date confidence is based on a clear understanding of the customer’s timing and urgency, and an accurate assessment of timing and urgency depends on the judgements we make about the other IMPACCT qualification factors.

With regard to this and every other qualification factor, we must never allow hope to be our strategy.

Helping you to Implement IMPACCT

We've created a simple-to-implement, customizable IMPACCT qualification workbook that can easily be uploaded to any modern CRM platform. It's supported by a range of training options and is available to Inflexion-Point's consulting and training clients.

If - as we hope and expect - the principles in this guide resonate with what you're seeking to achieve within your own sales organization, we should talk. To find out more, book a Zoom call at <https://www.inflexion-point.com/book-a-call>.

Outcome-Centric Selling® | IMPACCT Opportunity Qualification Worksheet

Organisation			Opportunity	Score
				0
Qualification Factor	Description	Status	Justify your conclusion and summarise the evidence	
I Issues and Implications	What are the prospect's key business issues, what are the implications, who is affected by them, and are the consequences sufficient to force them to take action?	?		0
M Money and Economic Metrics	Has an appropriate budget been allocated and if not, is there an obvious source of funding - and what is the economic impact of the key business metrics?	?		0
P Decision/Approval Process + Criteria	What are the prospect's decision and approval processes, what are their decision criteria - and are all of these clear and favourable to us?	?		0
A Authority and Influence	Who are the key stakeholders and gatekeepers and what influence do they have over the decision - and who has the ultimate authority to approve the project?	?		0
C Champion(s)	Have we identified and engaged with powerful and effective internal champions who are willing and able to promote our approach to the rest of the stakeholder group?	?		0
C Competition [Options + Projects]	What alternative options are they considering, how do we stand against them, and what is the relative priority of this project vs. their other investment opportunities?	?		0
T Timing and Urgency	How urgent is the project, when are they planning to make a decision, what is driving this, and how confident are we in this date?	?		0
NOTES				

6

About us

Inflexion-Point Strategy Partners are a European sales effectiveness consultancy with a global client footprint, and we are proud to be one of the pioneers in enabling forward-thinking sales organizations to adopt an outcome-centric approach to selling.

Many of our clients are technology-based businesses in the all-important scale-up phase between graduating from being a start-up and behaving like a slow-moving established corporate.

As we hope this document demonstrates, we have a great deal of practical experience in what it takes to implement an accurate and robust opportunity qualification regime in complex high-value B2B sales environments.

If you like what you have read in this guide, if you believe what we believe about the future of B2B selling, and you are curious enough to want to find out more, please drop me a line or book a call.

Regards



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