



Dynamic Opportunity Scorecard

**Spend Your Time & Resources
Only On Deals With The Highest
Probability Of Success.**

Directions

This Dynamic Opportunity Scorecard is meant to be the basis for a strategic discussion between a Sales Manager and Salesperson. **It's as much about planning to find out what you DON'T know as it is confirming what you DO know!** For each of the items, you can assign a **possible score of 10**.



If, between you and your salesperson, you **KNOW** the item and can say that the customer sees your firm as favorable, then assign a score of **10 under the YES column**.



If you **DON'T KNOW** something, assign a score of **0 under the UNKNOWN column**.



And if you **KNOW** the item but the customer sees your firm unfavorably, the score is **0 under NO**.

As the Opportunity Scorecard is Dynamic, it is meant to be updated as the Salesperson progresses through the sales process.

In the early stages of the sales process, a low score may mean that information is not yet known but can be acquired by the Salesperson. So a low score early in the sale is still considered winnable!

However, a low score for an opportunity late in the sales process, when information should be KNOWN is either a NO or UNKNOWN, the opportunity may be unwinnable and so a Sales Manager may counsel a Salesperson to abandon an opportunity to mitigate further consumption of valuable resources.

When decisions are made based on instinct and what leaders think will happen, they aren't based in fact.

One area we place special emphasis on is **pipeline integrity**. As Sales Resources are asked to do more in the COVID-age, it is particularly important that they focus on opportunities that are:

1. The opportunity is **VIABLE** and the client has budget and is willing to make the required change
2. **WINNABLE**
3. That they are a **GOOD FIT** for your organization's expansion plans.

With an average buying cycle of 5+ months, your firm cannot afford for it's most valuable assets, it's sales professionals – to be pursuing opportunities that have virtually no chance of winning.

Our Dynamic Opportunity Scorecard is a tool that forward-thinking companies use to gauge winnability, viability and fit of opportunities.

While normally, we would gather top-performing salespeople and sales leaders to customize a scorecard for an organization, or even a division within an organization, we offer a sample here that will greatly enhance any organization's fact-based analysis of existing opportunities in your pipeline.



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Opportunity Scorecard

Representative Name:

Customer Name:

Revenue Tied To Opportunity:

Projected Close Date:

Date of Analysis:

Opportunity Name:

Sales Phrase:

Time in Phrase

Action Steps #1

Action Steps #2

Opportunity Won/Why?

Opportunity Lost/Why?

Possible Score 10 or 0

Item	Criteria	Yes	No	Unknown	Criteria Score
Opportunity Viability					
V1	The customer has expressed a compelling reason to buy and a desire or commitment to make a change				
V2	The customer has allocated budget and we have confirmation of how much and when it is available				
V3	We have direct contact with the person who can allocate resources to the project & is willing to do so				
Sub Total Opportunity Viability 30 Maximum					
Opportunity Winnability					
W1	The customer believes we are uniquely qualified to solve their business problems and are better than alternatives				
W2	Key contacts have shared the options they're considering and that we are in a leadership position in relation to competitors				
W3	We have access to the financial buying decision maker & other key buying decision makers				
W4	We know all elements of the critical path including decision making processes, timing, and criteria				
W5	We have the ability and the opportunity to decision maker buying criteria				
Opportunity Winnability 50 Maximum					
Opportunity Fit					
F1	We have a coach/advocate in the customer organization who is supportive of solution/want us to win because we are the best fit for the solution				
F2	Our company sees this opportunity as a strategic win and a good fit and is willing to offer the best options for solutions and pricing				
Sub Total Opportunity Fit 20 Maximum					
Total Score 100 Maximum					



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Focusing on What Matters Most in your Sales Organization...

The Dynamic Opportunity Scorecard is one of 50 critical benchmarks in 6 proven dimensions of the Sales Performance System and display your firm's current state against your competition using a Maturity Modeling process that is unique to Oak Island Associates.

Our goal is to help you prioritize and identify what matters most for quick wins and longer term ROI of your investment in the Sales Organization

About Oak Island Associates

Focus

Oak Island Associates is a sales performance consulting firm. We help companies leverage market facing assets to achieve revenue, profitability and market share objectives.

Execution

While each client engagement is unique, we leverage a systematic approach and a robust body of knowledge of best practices to help our clients achieve measurable results against their business objectives in time frames that make business sense.

Commitment

"A passion for our craft" is a commonly heard phrase that describes our professionals' commitment to the success of our clients.

Results

We cut our teeth on results. Our Consultants bring successful executive careers built on delivery of tangible results in highly competitive business segments.

Our Approach

Data Collection

Data is gathered on four key Sales Performance dimensions to support rapid assessment of the client-firm's capabilities. These include Talent, Pipeline, Leadership & Enablement.

Benchmarking

Maturity models are created and benchmarking is sought to reach and validate comparisons. We measure the gap in performance between your firm and best-in-class comparables to reach.

Rapid Assessment

Data is quickly consolidated and analyzed, in as little as six weeks. We work with your team to prioritize the things that matter most to improve sales performance.

Actionable Insight

Findings are translated into recommendations that can be practically executed – high yield, simple to execute improvements become the top priorities.

Virtual Validation

True ownership of change comes with the buy-in of leadership, management and top performing salespeople. We leverage current best practices as a foundation for.

Measurement

Experts are made available to ensure the right things are happening at the right pace, providing critical support to the management team. Our goal is.

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