

**Deal/Opportunity Stages**

**Upon acceptance of a Sales Qualified Lead (SQL)**

	<i>Qualification</i>	<i>Diligence</i>	<i>Negotiation</i>	<i>Legal/Licensing</i>	<i>Paperwork</i>	<i>Closed Won</i>
<b>Sales Actions</b>	Basic BANT performed	Establish success criteria for diligence steps	POC/Pilot done or in progress	T&C discussion	Insure signing process gets completed.	Hubspot details and verified and entered.
	Confirm Economic Buyer	Conduct product presentation/demo/unpaid trial	Pricing vetted and approved	Exact product licenses and counts determined	Internal Knowledge transfer between sales/services/partner.	Finance Executes order and bills.
	Products to meet needs	Conduct paid POC/pilot	Quoted in Hubspot	Confirm contract signatory, process, dates	External communications around delivery dates.	
	Determine proof points	Verbal confirmation of pricing and terms	Scope of projects done	Identify post sales process and dates	CS New Customer Briefing	
	Customer interest to progress	Confirm SOE & step ownership	Contract process documented (vendor approval, security, legal, procurement)			
		Partner/Services engaged (Implementation, Customization, Training)	Coach/feedback from economic buyer on terms			
<b>Exit Criteria</b>	Fully Qualified	Internal verification we meet needs	Quote verbally accepted	Contract approved and delivered to client for signature	Signed contracts/agreements/quotes.	Fully executed paperwork
	Deal Type	Purchase criteria met and known (no known barriers)	Internal agreement amongst all stakeholders	Services plans in progress	Signed Scope of Services	Completed order internally
	Buying Process Known	POC/Pilot Success Criteria Documented and Met	Top level signer known (no veto)	Sales/CS team in touch and meeting		
	Incumbent/Competition Known		Implementation plan and agreement.			
			Close date validated.			
<b>Inspection Questions</b>	What is the impact of solving the problem?	Which competitor could win and why?	Who signs and when?	Client expectations and what's next	Where is the contract?	
	Who will make the purchasing decision? Can someone veto?	What are we missing and how will it affect outcomes?	Anything preventing from signing?	Post sales resources introduced		
	Who is our competition?	What would pause the deal/why would it push?	Have we coached on terms?			
	Is there a compelling event?	Implementation timelines and hazards				
<b>Forecast Category</b>	Pipeline; Omit	Best Case	Best Case	Commit	Commit	Closed
<b>Probability of Close/Contribution</b>	0%	40%	60%	90%	99%	100%