

Do we have a relationship with this person?	
Is this person willing and able to act on our behalf?	
BIO Highlights:	
Championⁱⁱ	
Name:	
Role:	
How does Our company compare with the incumbent or competitors <i>in the eyes of this decision maker</i> ?	
Do we have a relationship with this person?	
Is this person willing and able to act on our behalf?	
BIO Highlights:	
End-userⁱⁱⁱ	
Name:	
Role:	
How does Our company compare with the incumbent or competitors <i>in the eyes of this decision maker</i> ?	
Do we have a relationship with this person?	
Is this person willing and able to act on our behalf?	
BIO Highlights:	
Approver	
Name:	
Role:	
How does Our company compare with the incumbent or competitors <i>in the eyes of this decision maker</i> ?	
Do we have a relationship with this person?	
Is this person willing and able to act on our behalf?	
BIO Highlights:	

Customer Priorities

Issues: ^{iv} <i>What is the customer worried about?</i>	
Motivators: ^v <i>What is the customer trying to achieve with this specific opportunity and on a larger, organization-wide scale?</i>	
Hot Buttons: ^{vi} <i>Which of these issues and motivators are the customer's top priorities?</i>	

Customer Buying Process

Sketch out our understanding of the customer's buying process: Where is the customer currently in that process? ^{vii}	
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EX:

Decision Phase	Customer Concerns	Next phase begins when...
Recognition of Needs	<ul style="list-style-type: none"> Does the customer have a problem? How likely is it to put the program or mission success at risk? Is there ample justification for the customer to make a change? What are the customer's goals in making a change? 	Customer accepts that the problem is severe enough to justify change and decides to take action
Evaluation of Options	<ul style="list-style-type: none"> What criteria will the customer use in making a decision? Which competitor best meets the customer's criteria? 	Customer has a clear decision mechanism in place and has used it to select one or more final contenders
Resolution of concerns	<ul style="list-style-type: none"> What are the risks of making a change? What is at risk if the offeror cannot deliver? How will the offeror resolve any performance or management issues? Does the customer trust the offer? 	Customer makes the purchasing decision
Implementation	<ul style="list-style-type: none"> Is the customer getting value from their decision? How quickly will the customer see results? 	New needs and dissatisfactions arise

Are we in a position to help shape the outcome of the next phases of the process? If so, how and who is the POC to do so?	
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Customer Relationships

Who else does this customer interact with that we could develop a relationship with to	
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leverage and start shaping the customer's perception of us?											
EX:											
<table border="1"> <tr> <th colspan="2">Customer Relationships</th> </tr> <tr> <td>Universities and clinics</td> <td>Suppliers</td> </tr> <tr> <td>Pharmaceutical relationships</td> <td>Think tanks</td> </tr> <tr> <td>Government program managers</td> <td>Test and evaluation organizations</td> </tr> <tr> <td>Laboratories</td> <td>Congress and staffers</td> </tr> </table>		Customer Relationships		Universities and clinics	Suppliers	Pharmaceutical relationships	Think tanks	Government program managers	Test and evaluation organizations	Laboratories	Congress and staffers
Customer Relationships											
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Which competitors have existing relationships at this customer location or site?											
What is our past performance with this customer? How do they perceive us?											

Customer Buying History	
What are the customer's trends regarding staffing, resources, and budgets associated with this opportunity or similar ones?	
What is the customer's spending or ordering history associated with this opportunity or similar ones?	

Opportunity Analysis	
Is the opportunity solid, or might it be delayed or cancelled?	
Is funding committed to this program?	
What other agencies or organizations will influence the outcome of this opportunity?	
Are there any political or market issues influencing this solicitation or requirement?	
Has the customer developed their evaluation criteria? If so, what is it?	

ⁱ An “influencer” is someone who may not be actively involved, but who has a significant influence on the decision. The influencers may actually be outside the immediate agency or organization making the purchase.

ⁱⁱ Our “champion” is the person or people within the customer’s organization with whom our capture manager has been working to position us for the opportunity.

ⁱⁱⁱ The “end-user” is the healthcare provider or research team who will be most closely associated with our deliverables/services.

^{iv} “Issues” are the customer’s primary concerns—the worry items that keep the customer awake at night.

^v “Motivators” are the objectives that the customer is trying to achieve, i.e. cost reduction, risk reduction, support to the warfighter, quality improvement, increased efficiency, etc.

^{vi} “Hot buttons” are a consolidation of issues and motivators based on priority of importance to the customer. Hot buttons need to be constantly addressed throughout your communication with the customer, whether in person or in writing.

^{vii} If we have access to the customer, sit down with the appropriate person and collaboratively sketch the process using this generic process outline as a conversation starting point.