

Opportunity Review Template for Sales Execs

Opportunity Information

Account Name:		SFDC Oppty Link:	
Sales Executive:		Type of Sale:	
Lead Source of Opp:	What is the lead source listed in Salesforce? Ensure it is correct for data tracking.		
Committed Close Date:	The date you and the Customer have agreed on regarding when the contract should be signed by. Not an arbitrary date that's selected.		
What are the main pain points the customer is addressing by adopting HRS?	Quantify the pain and goals, do not just state the problem. For example, if readmission reduction, what is the cohort level readmission at today and what is the goal		

Opportunity Story

Tell us about the account.	What kind of account is buying and where is HRS being deployed?	HHA? Health System? Health System, but deploying through their HHA? Physician Group?
	Operational model:	Explain how they plan to operationalize the RPM program? Who is monitoring the patients? Is this a new program for them?
Budgeting Process	What budget is the project being funded from?	Don't guess, please ask the customer what budget the RPM project is coming from.
	Is the project already budgeted for or are we going to assist in creating the budget?	
	Why is the Customer buying the number of kits / licensees they are?	Please outline why / how the client arrived at the exact number. If it was through the ROI conversations, please ensure the ROI is attached to the opportunity in salesforce (under the Notes / Attachments section).
Who's our Competition?	Have we identified any competitors throughout this process?	List any / all competitors that have come up throughout the process, including any incumbents
	What concerns does the client have about our product / technical capabilities?	
Who are the key players?	Who is signing the contract?	Who (list name(s)) of the exact folks signing the contract?
	Technical Buyers (IS / IT Involvement in the Opp)	Who (list name(s)) is evaluating the solution from a technical / security standpoint?
	Economic Buyers	Who (list name(s)) is the evaluating the solution from an ROI / Economic standpoint?
	Operational Champions	Who (list name(s)) is responsible for operationalizing the platform? Have they met with our clinical team?
	Who is a detractor from the project or HRS	Is there anyone who against RPM or leaning away from HRS?

What's their decision process to select a vendor?	Decision Process & Criteria	It is your responsibility to as the Client "please outline the purchasing / decision process for me." What is the time frame? Who approves? What committee are involved? List of that information here.
What's our closing strategy?	Do they have clear EOQ incentives, and have they been clearly communicated and listed in the contract? What makes you confident it will close by the close date?	

Close Plan

Define the path to closure	Action Item	Yes/No	Next Steps	Due Date
	Have we confirmed the Customer their internal buying process?			
	ROI Analysis: Has HRS' clinical team reviewed an ROI analysis with main point of contact and economic buyer to understand ROI and actual number of kits / licenses required?			
	Have we mutual agreed upon a rollout schedule that will be embedded in the contract?			
	Have we confirmed this process in writing with agreed to dates by our Exec sponsor, Champion and Procurement?			
	Have we met the ultimate signatory & economic buyer of the deal?			
	Have we met with their IT and IS teams?			

Mutual Action Plan (to be filled out and agreed to with customer, Steps are examples – you must fill in the steps to Go Live)