[Account Name] Deal Review

Close Date: _____ | **Contract Value**: _____ | **Account Owner**: _____

Headlines

- [Company Name] is experiencing [significant change in the customer's business model / industry], which means [negative outcomes].

- [Executive] tasked [high-influence Champion] with driving [named project / strategic initiative] in response, with a target rollout date no later than [critical event].

- Compared to [alternatives, deal threats], [Executive] confirmed [direct quote about our unique/competitive differentiator] will enable [direct quote about positive outcomes].

Buying Behavior & Deal Evidence

Based on the Sales Process 2.0 Playbook & Stages

- ☐ Do we have a written problem statement built with the buying team's own data?

- ☐ Do we have direct comments or edits from them, either confirming or correcting our POV?

- ☐ Do we have no less than 3 buying roles confirming our impact to a specific, exec-level metric?

- ☐ Did the buying team exec fund a project or internal initiative to do *something*? Do we know that internal project name and team?

- ☐ Did the project team set a specific go-live date that, if missed, means a worse outcome?

- ☐ Do we have written confirmation they've stopped exploring other alternatives? Because they see we have a specific differentiator that others options don't?

- ☐ Has the buying team stuck to a "backdated" set of tasks/milestones? Are we ahead or behind of where we thought we'd be?

Resources

- [Insert link to business case].

- [Link to business case scorecard].

Let Fluint build a 60-second review for every deal:

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