

Opportunity Insight Tool

CONTACT NAME

DATE

CONTACT TITLE

COMPANY NAME

Step 1

Write down information about a lead on a sticky note.

Step 2

Place sticky note on most relevant part of the quadrant.

Step 3

Take appropriate action based on lead's category.

More Urgent

SMOKEY SAM RISKY CUSTOMER

Who Wants a solution but does not understand the problem
Act Educate Sam about the problem

FIRE FREDDY IDEAL CUSTOMER

Who Wants a solution now and understands the problem
Act Pick up the phone and call Freddie

Less Aware

More Aware

CONFUSED CRAIG BAD CUSTOMER

Who Doesn't care for a solution and doesn't understand the problem
Act Ignore Craig and focuses on other leads

ISSUES ELLIE PROMISING CUSTOMER

Who Wants a solution for other issues but sees the problem
Act Place Eli in a marketing drip campaign

Less Urgent

Budget: Is there a budget earmarked for a solution? Are you in contact with the economic buyer?

Yes No

Pain: Can the evangelist or economic buyer quantify costs and pains of not having 'your' solution?

Yes No

Benefits: Do they think your solution will help them get more customers?

Yes No

Evangelist: Do the evangelists's colleagues also see the problem? Or is the evangelist alone?

Yes No

Technical Buyer: Are there hidden costs or objections to buy or implement your solution?

Yes No

