



How to Interpret the Analysis

Analysis Summary Page

SUMMARY

SWOT ANALYSIS

MISSING INFORMATION

ACTION ITEMS

VELOCITY CHART

OPPORTUNITY: Sample Analysis

Amount: \$35,000

Closing Date: 8/27/2010

Date Opened: 4/9/2010

Last Updated: 6/23/2010

Type of Sale: Products

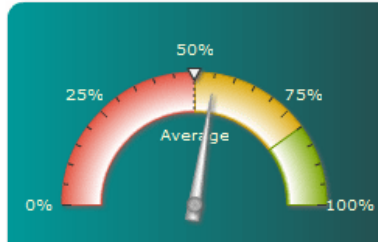
Company: Livingston Corp
 Address: 2300 South Central Parkway, Mediumville, GA 3303 0110
 Contact name: Bridgit Taylor
 Contact phone: 907 555-1342
 Contact e-mail: bridgit.taylor@Livingston.com
 Notes:

Original Amount: \$35,000
 Oculus Forecast: $\$35,000 \times 55\% = \$19,250$

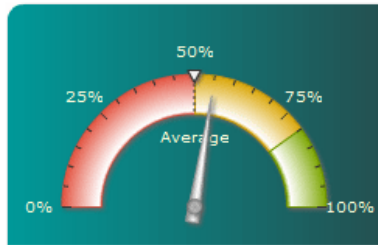
This opportunity is qualified (Q).

However, additional information is required in order for you to better understand your chances of winning the business. Review the questions you answered 'Uncertain' and obtain the missing information.

Degree of Qualification (DoQ) = 55%

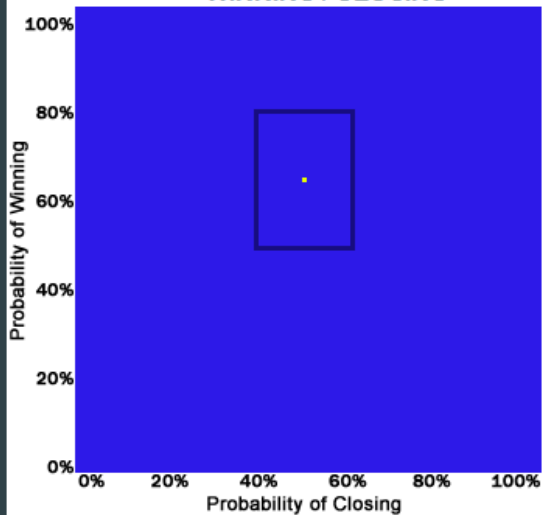


Confidence Factor (CF) = 55%

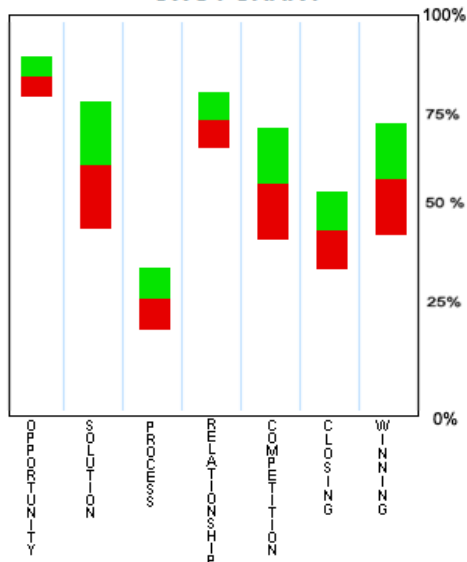


	Low	Score	High
Closing	38%	48%	57%
Winning	48%	61%	75%

WINNING / CLOSING



SWOT CHART



Explanation of Graphs & Charts

Opportunity Name: Name of the Opportunity

Amount: The total amount you expect the deal to close for.

Closing Date: Forecasted Close Date

Date Opened: Date you first analyzed the opportunity

Last Updated: Last time you updated the opportunity file.

Type of Sale: What re you selling, 7 different possibilities

- Products
- Services
- Consulting
- Software
- Solution
- Systems Integration
- Outsourcing

Company Name:

Address:

Contact Name:

Contact Phone #

Contact Email:

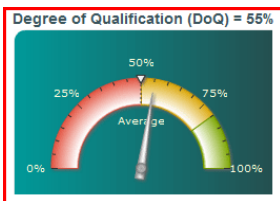
Notes: Notes, usually a short description of the opportunity

Original amount: As above

Oculus Forecast: = Amount x Confidence Factor (CF)
Use this number when forecasting the opportunity

DoQ Comment: A statement of the degree to which the opportunity has been qualified;

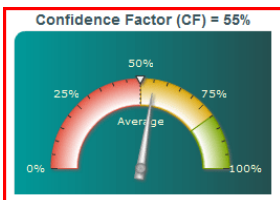
- NQ Not Qualified
- PQ Poorly Qualified
- MQ Moderately Qualified
- Q Qualified
- WQ Well Qualified
- EWQ Extremely Well Qualified



Degree of Qualification (DoQ) Gauge

Visual indication of the degree to which the opportunity has been qualified.

Objective: DoQ = 100%



Confidence Factor (CF) Gauge

Visual indication of the confidence you can have in winning the business if the prospect made a decision today.

The CF is used in the forecast (Forecast = CF x Amount).

Objective: CF = 100%

How Oculus Works (Outputs): (57 sec. video)

<http://www.youtube.com/watch?v=gk3y1TDrZoA>

Explanation of Graphs & Charts

WIN / CLOSE Table

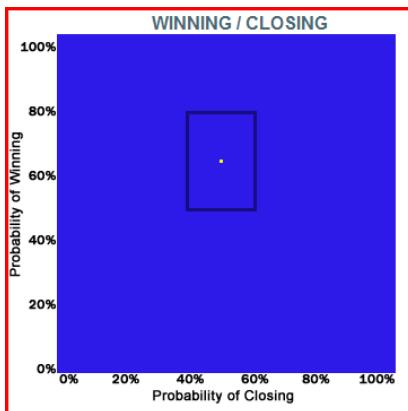
	Low	Score	High
Closing	38%	47%	56%
Winning	48%	61%	75%

Win / Close Table

Indicates the range of probabilities (from Low to High) of winning & closing (by the Close Date). The Uncertainty Range (of probability) is given by the high value minus the Low value.

The size of the Uncertainty Range is a direct reflection of how well the opportunity has been qualified and the amount of missing or incomplete information. The greater the amount of missing information, the larger the Uncertainty Range and the lower the DoQ of the opportunity.

WIN / CLOSE Chart



Win / Close Chart

A 2D graph of the Win/Close Table.

Vertical Axis = Probability of Winning

Horizontal Axis = Probability of Closing (by the Close Date)

The Uncertainty Range for Winning & Closing forms a box around the Score (the Yellow Dot) called the Uncertainty Zone. The larger the Uncertainty Zone, the lower the DoQ of the opportunity.

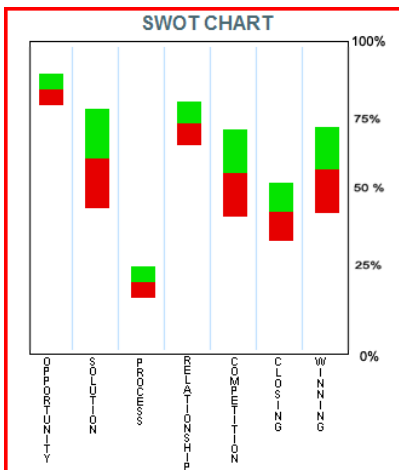
Objective:

Yellow dot (Score) in the top right hand corner and the Uncertainty Zone very small.

The Win /Close Chart: (62 sec. video)

<http://www.youtube.com/watch?v=XmXI-CBSoiw>

SWOT Chart



SWOT Chart

The Score & Uncertainty for each category.

The length of the bar indicate the size of the Uncertainty Range for the category.

Green = Uncertainty above the Score

Red = Uncertainty below the Score.

Can quickly identify strengths, weakness and areas of risk;

Strength: Description, relationship

Weakness: (Decision) Process, Closing

Risk: Competition, Solution

Objective:

All categories at (or near) 100%, Uncertainty Range = 0%

The SWOT Analysis Chart: (56 sec. video)

<http://www.youtube.com/watch?v=FnFTv63Ouwg>

Explanation of Graphs & Charts

Detailed SWOT Analysis

COMPETITION			
		Rating	Description
High	0.74	OPPORTUNITY	The high-point of the Uncertainty range indicates that you have the opportunity to strengthen your position in this category.
Score	0.60	EXPOSURE	Your chances of beating the competition are not strong.
Low	0.47	THREAT	The low-point of the Uncertainty Range places you at risk in this category
			RECOMMENDATIONS Revisit your competitive analysis to determine if you have a realistic chance of beating the competition and winning the business. The Uncertainty Range for this category is outside acceptable limits. Reduce the size of the Uncertainty Range by reducing the amount of missing information for this category. The low-point of the Uncertainty Range places you at risk in this category. Examine those questions that you answered with 'Uncertain' and obtain additional information to reduce or eliminate the uncertainty.

Detailed SWOT analysis

Shows the High, Score & Low values obtained for this category, and rates those values;

High = 0.74, Opportunity

Score = 0.60, Exposed

Low = 0.47, Threat

Provides General Recommendations at a category level (as opposed to specific recommendations as shown in the Action Item section).

Indicates whether or not the Uncertainty Range for the category is within acceptable limits.

Missing Information

SUMMARY	SWOT ANALYSIS	MISSING INFORMATION	ACTION ITEMS	VELOCITY CHART
<h2>MISSING INFORMATION</h2> <h3>OPPORTUNITY: Sample Analysis</h3>				
OPPORTUNITY				
Determine if this project is part of or linked to any other projects underway in the Prospect's organization.				
<hr/>				
You must determine if the project is funded, delays in funding have the potential to delay the closing date.				
<hr/>				
Determine if the Prospect has tried to find a solution to the problem(s) that is creating this project.				
<hr/>				
SOLUTION				
Determine the budget amount that the prospect has set aside for this project or the amount they expect to set aside.				
<hr/>				
Try to determine the potential ROI that your solution will generate for the prospect.				
<hr/>				
Confirm that the prospect will accept your proposed solution, if not, understand why and determine if you should proceed.				
<hr/>				
Confirm who will be using your solution and enlist their support for your proposal.				
<hr/>				
Determine if the impact of solving the prospect's problems can be measured and use those measurements to build a strong numeric argument for your solution.				
<hr/>				
PROCESS				
Determine from your contacts how much support this project has from senior management.				
<hr/>				
Identify all individuals and groups involved in the Decision Process, also include individuals who can influence the decision.				
<hr/>				
Confirm with the prospect who is the final decision maker and arrange to meet this person.				
<hr/>				
You must identify and meet all individuals involved in the Decision Process.				
<hr/>				
Try to determine how the decision makers are measured. If your proposed solution impacts their personal metrics, ensure that it does so in a positive manner.				
<hr/>				
Confirm who is driving this project and arrange to meet them.				
<hr/>				
You must understand why your 'Inside Salesperson' wants you to win. What's In It For Them?				
<hr/>				

Missing Information

On a category by category basis, lists important information about the opportunity that is missing or incomplete.

The more information that is missing, the lower the DoQ of the opportunity.

Always try and obtain Missing information first.

Action Items

SUMMARY **SWOT ANALYSIS** **MISSING INFORMATION** **ACTION ITEMS** **VELOCITY CHART**

ACTION ITEMS

OPPORTUNITY: Sample Analysis Click on stars to mark items 'done' ↓

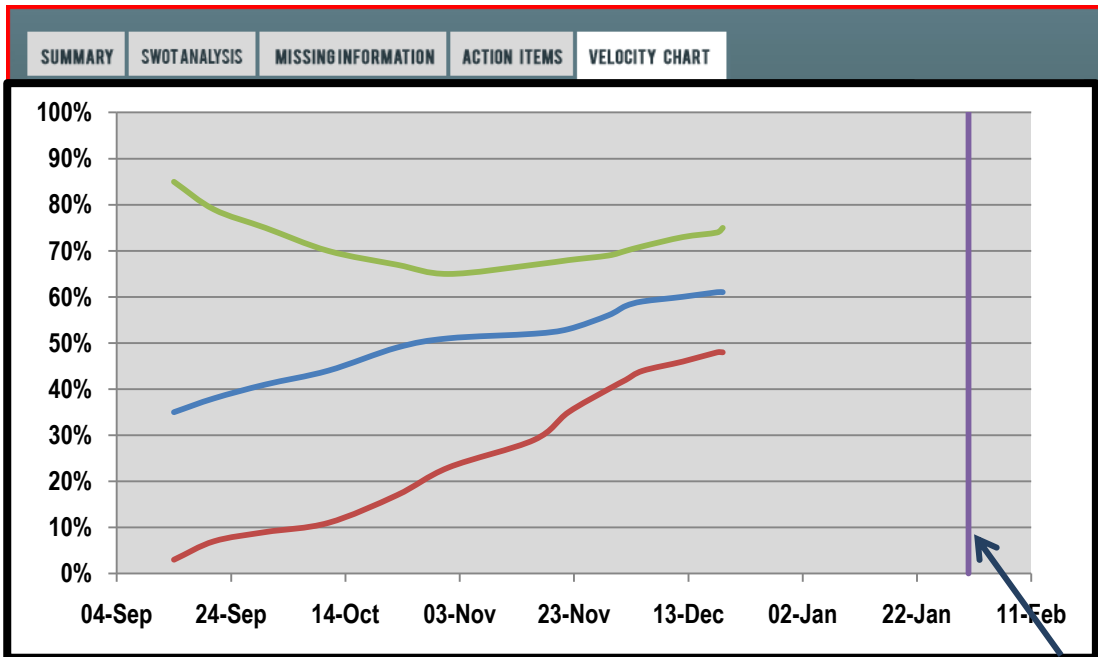
OPPORTUNITY

- Ensure that your proposal emphasizes how it satisfies the requirements of the Compelling Event that is driving this project. ★
- Ensure that your proposal clearly shows how the problems the Prospect is trying solve will be solved if they implement your solution. ★
- Ensure that you meet with this person to understand their objectives, for both the project and their personal objectives. ★
- Find out why the Prospect has not yet determined the vendor selection date (your opportunity Close Date). A project without a specific vendor selection date or Due Date may not be as real a you would like to believe it is. At a minimum, reset your expectations so that you have a clear idea of when this opportunity will close. ★
- Ensure that the prospect knows that you understand the importance of this project and that you are doing everything you can to help ensure it's success. ★
- The prospect must have some idea of the project requirements. Work with the Prospect to create a formal Statement of Requirements (SOR). ★
- Work with the Prospect to define their requirements to a greater degree. You can not provide a meaning proposal until you get a clear definition of their needs. ★
- Review the project requirements with the prospect to ensure that you have a clear understanding of what they are. Also, there may be an opportunity for you to add a couple of objectives that play to your strengths. Try to use terminology like; "Have you thought about.....?". ★
- Review the project critical success factors with the prospect to ensure that you have a clear understanding of what they are. Also, there may be an opportunity for you to add a couple of critical success factors that play to your strengths. Try to use terminology like; "Have you thought about.....?". ★
- Strategic projects capture a lot of attention and quite often there is more at stake than just the project deliverables. Meet with the prospect and let him/her know that you understand the importance of this project and that you are committed to the project success and their success. ★

Action Items

On a category by category basis, lists a number of Action Items designed to drive the opportunity through the sales cycle.

Velocity Chart



**Close Date
Line**

Win / Close Table

	Low	Score	High
Closing	38%	47%	56%
Winning	48%	61%	75%

Objective:

3 lines converge at 100% at the Close Date Line.

Velocity Chart

Takes the Low, Score & High values of the Winning Probability and graphs it on the Vertical Axis and the Update Date on the Horizontal Axis.

The Velocity Chart is updated every time new information is entered into the Opportunity file.

Provides a visual indication of the Winning Uncertainty Range (High minus Low), which implies a low DoQ, and How that improves (i.e. the Uncertainty Range decreases) as you drive the opportunity through the sales cycle.

Can track your progress with the opportunity.
Flat lines indicate little, or no, progress.
Can determine the true length of the sales cycle.

Occulus Process & The Velocity Chart: (128 sec. video)

<http://www.youtube.com/watch?v=DPfXqHknPNY>