

Checklist for Winning a Complex Sale

- ❑ Identify the customer, the decision makers, and the influencers
- ❑ Identify the motivations of the customer, the decision makers, and the influencers
- ❑ Who is your champion and who is not?
- ❑ With which government regulations must you and your customer comply?
- ❑ What procurement systems apply to the products and services you are selling?
- ❑ What discretion do buyers/contracting offices have to quickly buy products and services from you?
- ❑ Are there external influences on the customer? Congressional action, lobbyists?
- ❑ Do your homework:
 - Past purchasing/Buying Trends (publicly available data)
 - Budgets/Forecasts (posted at the beginning of the fiscal year)
 - Acquisition Strategies (small business program, supplier diversity etc.)
 - Players (ecosystem), primes, subs, consultants, regulators, standard setting bodies
 - Incumbents (competitors or partners)
 - Target specific offices/agencies
- ❑ What makes you unique?
 - What is the job the customer needs to be done?
 - How is it being done now?
 - Validate your assertions

- Give customized briefings
- Demonstrate your offerings
- Ask for a pilot project to prove your solution

Team to Win

- Is your customer meeting their set-aside goals?
- Leverage strengths and certifications.
- Partner with other smalls.
- Subcontract to others to get your foot in the door. Create past performance and develop relationships.

Execute Your Plan

- Invest in infrastructure: people, processes and technologies
- Understand and leverage procurement rules.