

Decision Grid

Name _____

Opportunity Name _____

Last Updated _____

How will the client make this decision?				
Steps	Decision(s)	When	Who	Criteria/Beliefs
		Client validated?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

Yellow Lights in Resources

Time

People

Money

Using the Decision Grid

Steps: What are all of the steps your client will take to make a good decision, regardless of the provider they choose?

Decision: What decision gets made in each step?

When: When will each go/no-go decision be made?

Who: Who is involved in each step?

Criteria and Beliefs: How will each decision maker decide?

Examples

Steps: Possible steps could include:

- Confirmed interest
- Capabilities presentation
- Formal proposal
- Authorization

Decision: Possible decisions could include:

- Narrow the choices
- Comply with budget
- Recommend top choice
- Make final decision

Criteria and Beliefs: Possible decisions could include:

- Business solution
- Proven history of success
- ROI
- Risk

Be Aware

Completing a Decision Grid is a team effort; be sure to involve the people who have the information you need.

The more boxes of client-validated information, the greater the likelihood you can win this deal.

If you are deep into your sales cycle and have a fairly empty Decision Grid, this should be a major Yellow Light.

If you are blocked from gaining the information you need to complete the Decision Grid, it's likely someone else is already gaining access. Reevaluate whether your investment of resources might be better spent on other opportunities.

“Decision Grid” Best Practices

Steps: Ensure you get good information about what decisions are required to get a “yes” by making “no” an okay answer.

Decision: Use the decision to help plan the energy, time, and investment you need to commit.

When: Have at least a tentative date for each go/no-go decision.

Who: Go beyond names and titles to understand the political positioning of each person within the opportunity (e.g., champion, gatekeeper, detractor).

Criteria and Beliefs: Do not make a presentation or proposal to people whose criteria for judging are unknown to you.