



Customer Logo

Title (NOTE: This is your overall Value Proposition for the key Outcomes Important to the Customer)

Your Name

Title

Date

TIPS

- Either a Document or Slides will work as long as you are in person with the Customer
- Make it Easy to Understand (no acronyms of yours and use their language – their acronyms are OK and even preferred)
- REMEMBER: This is not a presentation but rather a dialogue! Invite conversation and questions!

OUTCOMES IMPORTANT TO (CUSTOMER NAME)

- Outcome #1
- Outcome #2
- Outcome #3
- Outcome #4
- Outcome #5

TIPS

- Keep to a hand full of the Key Outcomes
- Present “humbly” not as fact but rather what we understand today (that’s why we’re meeting)
- At the end, ask the Customer “Is this list right or is there something we missed?”



IMPORTANT TO (CUSTOMER) IN OUR DEAL

Key Elements of Our Offer

Product / Solution #1

Product / Solution #2

Support

Service #1

Service #2

Other (CVR, References, etc.)

Close Date

(Customer) Key Outcomes

Outcome #1

Outcome #2

Outcome #3

TIPS

- Customer Outcomes are the same as Slide #2
- You do not need to use boxes with arrows, but I have found them very effective, especially in PowerPoint
- If the arrows get too busy, have the previous ones “fade” before you do the next Deal Lever
- Remember our goal is for the Customer to clearly see how all of the Key Deal Levers of our offer relate to their Outcomes



IMPORTANT TO (YOUR COMPANY) IN A DEAL

- Item #1
- Item #2
- Item #3
- Item #4
- Item #5
- Item #6
- Item #7

TIPS

- Our Goal is for the Customer to understand where we are coming from because the Deal needs to work for us both
- Do not expect they will like or agree with everything you say, but if it's important – Let them know!
- Don't forget items that are strategic in nature such as CVRs, References, Jointly published papers, etc.



PAST VALUE DELIVERED

- Customer #1 (or this Customer if they are existing)
 - Outcome #1 (PVD #1)
 - Outcome #2 (PVD #2)
 - Outcome #3 (PVD #3)
- Customer #2
 - Outcome #1
 - Outcome #2
 - Outcome #3
 - Outcome #4

TIPS

- Remind this Customer of Past Value Delivered (PVD) if they are a current Customer
- No need to present more than 2 to 4 Examples
- Favor existing Customers that had similar Outcomes they wanted to achieve versus just a logo in the same industry





Options For Moving Forward

TIP

- This is purely a transition slide or placeholder and is entirely Optional

	Title (Outcome / Value Proposition)	Title (Outcome / Value Proposition)	Title (Outcome / Value Proposition)
What each option delivers to Customer (Optional)			
Product / Solution #1 Description Product / Solution #2 Description Support Description Discount Rate Product / Solution Total Price	<p style="text-align: center;">TIPS</p> <ol style="list-style-type: none"> 1. Structure the Options so that they may be presented side by side. That is the easiest way for the Customer to understand how each Option differs and what they get with each. 2. Title each Option as an Outcome or a Value Proposition so it is easy for the Customer to understand. Note in this example there is a Title as well as a description, which is fine. 3. Do not try to put everything into the Options as you ideally want to keep it to one page. It's OK to leave things out of lesser importance. In this case, the Rep left out the desired Customer Value Reviews as well as References, presenting Papers, etc. 4. Don't forget the Discounts (if you choose to show them) should be numbers that are not whole or especially divisible by 5 or 10 (18.7% versus 20%). 5. You need to give them the Pricing in order to make a decision, but you don't need to provide a detailed line item by line item pricing. See how these were summarized, but don't give any number that ends in three or more zeros (\$523,485 versus \$520,000) 6. Build your own table to suite your business and needs –this is just an example 		
Professional Services Description & Pricing			



SUMMARY: WHAT WE TRIED TO ACHIEVE

- Reword Outcome #1
- Reword Outcome #2
- Reword Outcome #3
- Reword Outcome #4
- Reword Outcome #5
- Etc.

TIPS

- Simply reword their Desired Outcomes in Slide #2
- If you feel the need to provide additional backup tables, illustrations, data etc., then make them an Appendix and put them after this Slide
- My experience is they are hardly ever needed – especially if this is conducted as a *Dialogue with the Key Decision Makers versus a Presentation!*

