

Deal Review Meeting

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This meeting is to support an Account Executive on a customer opportunity pursuit. The meeting members should include the AE, their manager, and executive representatives from supporting groups – partner, services, CS, and the leadership team.

WHY CHANGE?

- ☐ What client business problem is related to this opportunity?

Summary:

Next Steps:

- ☐ What are the associated business goals and success factors? What happens when they solve their problem?

Summary:

Next Steps:

- ☐ Who is accountable for the goal and/or the problem resolution?

Summary:

Next Steps:

- ☐ Do you have an executive sponsor? If not, what action do you have for your champion?

Summary:

Next Steps:

WHY NOW?

- ☐ What is the activation event?

Summary:

Next Steps:

- ☐ What is the compelling event?

Summary:

Next Steps:

- ☐ How does this project rank as a priority? What may be the competing initiatives?

Summary:

Next Steps:

- ☐ What current state data have you gathered?

Summary:

Next Steps:

- ☐ Has the client validated the data and summary you've presented?

Summary:

Next Steps:

- ☐ What has the client confirmed as their decision-making criteria?

Summary:

Next Steps:

- ☐ Can we influence decision timelines and decision-making process?

Summary:

Next Steps:

- ☐ Do we require a partner to deliver the solution? What is our partner's history in this account and how can this be leveraged?

Summary:

Next Steps:

- ☐ Is there competition we're aware of? What is your strategy vs. them? Has the client validated?

Summary:

Next Steps:

- ☐ What is our unique business value and is it quantified and linked to their goals/success factors?

Summary:

Next Steps:

- ☐ Has the client helped you co-author the future state solution?

Summary:

Next Steps:

WHY NOT?

- ☐ What could keep this client from moving forward?

Summary:

Next Steps:

- ☐ How will you address the common client concern of "will this solution work?"

Summary:

Next Steps:

- ☐ Do you predict any challenges from other stakeholders?

Summary:

Next Steps:

FEEDBACK AND PLAN

- ☐ What feedback do we have for the AE?

Summary:

Next Steps:

- ☐ What support can we offer?

Summary:

Next Steps:

- ☐ What is our critical path to close or mutual action lan?

Summary:

Next Steps:
