Our Opportunity Strategy

Use this tool to collaborate on and document information about the opportunity and our plan to win. (Note that this worksheet mirrors the Steelcase Opportunity Strategy template in Salesforce.)

Information

Opportunity Strategy name:	
Opportunity name:	
Account:	

About the Client

Client overview *(Who are they, what they do, our history with them)*

About the Opportunity

Opportunity Situation, Size + Scope

Client's Goal for the Project
(What space issue are they trying to solve?)

Our Opportunity Strategy

The Strategy: How will we help the client accomplish their project goal?

For help or questions: salescoach@steelcase.com

Our Relationship Plan *(How will we build existing and develop new relationships? Who will we leverage?)*

Our Product Plan *(What do we anticipate our product response will be?)*

Our Pricing Plan *(What is our current POV on our pricing strategy?)*

Other: Identify any other key components of our win strategy

The Pre-Mortem: How might we lose?

Risk	How will we mitigate this risk?
Risk	How will we mitigate this risk?
Risk	How will we mitigate this risk?

For help or questions: salescoach@steelcase.com

Our key initiatives to advance the opportunity

What we will do	How, Who + When

What we will do	How, Who + When

What we will do	How, Who + When

What we will do	How, Who + When

What we will do	How, Who + When

What other tools and job aids are available to help me create my Opportunity Strategy?

In Sales Compass (on Spark), you can access these resources:

- Opportunity Team strategy workshop,
- Work Experience Model workbook, and
- Client Research worksheet.

Where do I record my Opportunity Strategy?

- Document your strategy in Salesforce:
- Select your Opportunity,
- click the "Related" header,
- scroll to "Opportunity Strategies",
- then, click on "New".

That will open a new fillable Opportunity Strategy template that mirrors this worksheet.

For help or questions: salescoach@steelcase.com