

THE "INTELLIGENCE" CHECKLIST

The more information and insight you have about a client's problems, situation and needs the better you will be positioned to discuss your solutions in a compelling way. Use this checklist to ensure that you are gathering the intelligence you need and, once gathered, that you are communicating it fully with the team.

- Why are they going to market?
- Who is the incumbent? What is working, not working?
- Why were you selected as a finalist? What did they like? Did they have any concerns?
- Who of your competitors have been invited to present?
- What is the decision making process? Will they be using a scorecard?
- Are there any decision makers that will not be present?
- Who will be on the buying committee? What are their roles?
- What have you learned from LinkedIn and other research?
- How would you describe the personality of the group?
- What moles/coaches can you engage to gain insight?
- How much time will you have to present?
- Will the client be issuing an agenda?
- Do you know the room in which the presentation will be conducted? What is the shape, setting, seating?
- Is there an administrative person that you can contact regarding logistics?