The Enterprise Deal Review.

One live enterprise deal, inspected against the four things that decide it. Answer with evidence, not opinion. A green needs something you could show someone: a document, a name, a date, a number. If you are relying on a feeling from a call, it is amber at best.

ACCOUNT	DEAL VALUE	STAGE	REVIEWED ON

01 · POINT OF VIEW

- ☐ We can state their goal or loss in **their published words**, from a source they would recognise.
- ☐ The cost of the status quo is **quantified per month**, with the assumption written down.
- ☐ A competitor **could not send our message** to this person and have it still make sense.
- ☐ The problem statement exists as **their document**, not ours.

○ GREEN ○ AMBER ○ RED

02 · TRUST

- ☐ Security and data posture is **already written** and could go out within the hour.
- ☐ There is an **implementation plan with named roles**, not job titles, and a risk log.
- ☐ Two references have **agreed to take a call** in the last six months.
- ☐ The **small vendor question** has been answered in writing, by us, first.

○ GREEN ○ AMBER ○ RED

03 · PENETRATION

- ☐ We can **name a person in three different functions**, not three people in one.
- ☐ The champion has **put credibility on the line** with someone senior.
- ☐ We have a **path to the economic buyer** and know what has to be true for approval.
- ☐ The champion has been **given the pack**: one page PoV, three sentence email, three slides.

○ GREEN ○ AMBER ○ RED

04 · DEAL CONTROL

- ☐ A **mutual action plan exists** with dates, owners and artefacts, agreed with them.
- ☐ More than half the owners on that plan say **them**, not us.
- ☐ **Procurement, legal and InfoSec** are already engaged, with their own dates.
- ☐ The **next meeting is in the diary**, with a purpose, not a follow-up promise.

○ GREEN ○ AMBER ○ RED

VERDICT, AND THE ONE THING TO FIX

All four green
Forecast it. Inspect it again in three weeks against the plan dates rather than the close date.

One or two amber
Workable. Fix the weakest row this fortnight. Do not move the close date until it is green.

Any red, or three amber
Not a forecast deal yet. Either invest properly in the weakest row or take it out of commit and say so.

The weakest row is

The one action this week is

Most deals sit in the right hand column on at least two rows. That is normal. Fixing one row is about a fortnight of work and it changes the odds materially.

Bring a completed one of these to a free sixty minute Revenue Workshop.
We will inspect the deal with you and you keep the report either way. Operator to operator, not a sales call: **closingfoundry.com/revenue-workshop**
Not sure the whole motion is right yet? Start with the free two minute Growth Score: **closingfoundry.com/growthscore**

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