

Won Sales Analysis™

Trigger Event Selling™ Won Sales Analysis™ Worksheet

Customer Name: _____ Date of Sale: _____
 Services Sold: _____ Rating: _____

IDENTIFY			
What events/changes lead up to this purchase? (Select all that apply)			
Bad Experience	Change	Awareness	Notes/details
<input type="checkbox"/> People	<input type="checkbox"/> People	<input type="checkbox"/> Legal	
<input type="checkbox"/> Product/Service	<input type="checkbox"/> Places	<input type="checkbox"/> Risk Avoidance	
<input type="checkbox"/> Company	<input type="checkbox"/> Priorities	<input type="checkbox"/> Economics	
FIND			
When did the event(s) happen?			

CLOSE			
What made you choose us?			

IMPROVE			
How can we make it easier to become our customer?			

CLASSIFY			
Customer Demographics (Select One For Each Column)			
Size	Decision Maker	Industry	Notes/details
<input type="checkbox"/> < \$100 Million	<input type="checkbox"/> Finance	<input type="checkbox"/> B2C	
<input type="checkbox"/> \$100 Mil.-\$500 Mil.	<input type="checkbox"/> Operations	<input type="checkbox"/> B2B	
<input type="checkbox"/> > \$500 Million	<input type="checkbox"/> Sales / Marketing	<input type="checkbox"/> Wholesale	
Lead Source (Select One)			
Marketing	Sales	Self	Notes/details
<input type="checkbox"/> Online	<input type="checkbox"/> Local	<input type="checkbox"/> Networking	
<input type="checkbox"/> Offline	<input type="checkbox"/> Regional	<input type="checkbox"/> Cold Calling	
<input type="checkbox"/> Channel	<input type="checkbox"/> Divisional	<input type="checkbox"/> Customer Referral	
Size of Sale (Select One)			
<input type="checkbox"/> < \$10,000	<input type="checkbox"/> \$50K - \$100K	<input type="checkbox"/> \$500K - \$1Million	Notes/details
<input type="checkbox"/> \$10K - \$25K	<input type="checkbox"/> \$100K - \$250K	<input type="checkbox"/> \$1 Mill. - \$2.5 Mill.	
<input type="checkbox"/> \$25K - \$50K	<input type="checkbox"/> \$250K - \$500K	<input type="checkbox"/> Over \$2.5 Million	
Sales Cycle (Select One)			
<input type="checkbox"/> < 14 Days	<input type="checkbox"/> 3 - 6 Months	<input type="checkbox"/> 1 - 1.5 Years	Notes/details
<input type="checkbox"/> 15 - 45 Days	<input type="checkbox"/> 6 - 9 Moths	<input type="checkbox"/> 1.5 - 2 Years	
<input type="checkbox"/> 46 - 90 Days	<input type="checkbox"/> 9 - 12 Months	<input type="checkbox"/> > 2 Years	

Every Time You Win a NEW CUSTOMER

- Ask your primary contact the questions in the first four grey areas documenting their responses in the lined areas provided in the top four sections
- Classify the opportunity using the check boxes and notes sections in the bottom half of the worksheet
- Search for patterns in your customers and the conversion rates by type of Trigger Event and lead generation method

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