

Identifying Opportunities that Might Slip by the Close Date

Occulus Analysis:



SUMMARY
SWOT ANALYSIS
MISSING INFORMATION
ACTION ITEMS
VELOCITY CHART

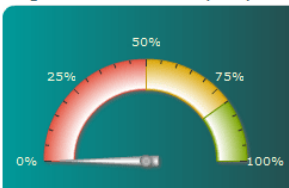
OPPORTUNITY: COaching

Amount: US\$100,000 **Closing Date:** 7/29/2011
Date Opened: 2/2/2011 **Last Updated:** 2/2/2011
Type of Sale: Products


Company: ABC Inc
Address: 555 Main Street North
Charlotte, NC
Contact name: Paul Dirac
Contact phone: 735 555-1212
Contact e-mail: paul.dirac@ABCInc.com
Notes:

Original Amount: US\$100,000
Occulus Forecast: US\$100,000 x 1% = US\$1,000

Degree of Qualification (DoQ) = 0%



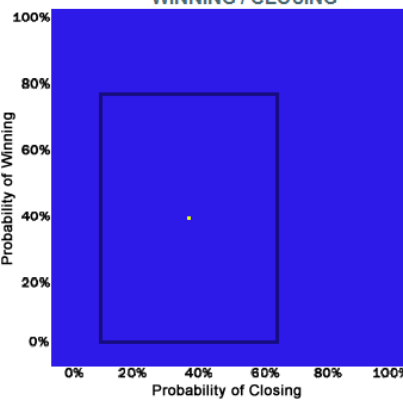
Confidence Factor (CF) = 1%



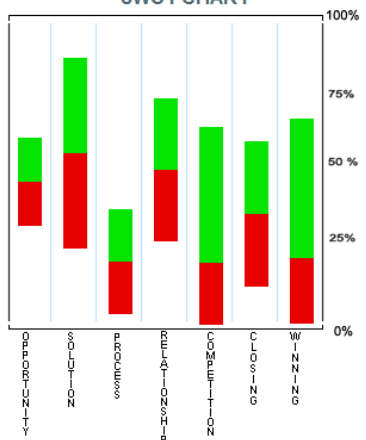
This opportunity is not qualified (NQ).
A significant amount of information about this opportunity is missing.
Review the questions you answered 'Uncertain' and obtain the missing information.

	Low	Score	High
Closing	13%	37%	61%
Winning	1%	22%	68%

WINNING / CLOSING



SWOT CHART



Identifying Opportunities That May Slip Past the Close Date

Opportunities that are at risk of slipping past the Close Date can be identified by a low Probability of Closing (Horizontal Axis) or by having a high degree of uncertainty in Closing as measured by the difference between High Value and the Low Value. The SWOT Chart the shows uncertainty in the Closing and the SWOT ANALYSIS page provides additional details.

In this example the Sales Rep is well positioned to win the deal, but the probability of it closing by the Close Date is low (65%) and there is a large degree of uncertainty in that probability; Range: Low = 44% to High = 85%.

The Sales Rep needs to confirm that the deal will close by the Close Date.

The sales rep should exercise care when forecasting this opportunity, it could slip beyond the close Date.



Prob of Closing by the Close Date = 65%

Large uncertainty in the Prob of Closing by the Close Date.