

# Logics Worksheet

Cell 1

## Prospect Profile

*“How would you characterize the Prospect?”*

- Major products/markets \_\_\_\_\_  
\_\_\_\_\_
- Annual revenue/profitability/trends \_\_\_\_\_  
\_\_\_\_\_
- Major competitors \_\_\_\_\_  
\_\_\_\_\_
- Market/industry issues \_\_\_\_\_  
\_\_\_\_\_
- Strategic direction \_\_\_\_\_  
\_\_\_\_\_
- Experience with your competition \_\_\_\_\_  
\_\_\_\_\_

# Logics Worksheet

Cell 2

Prospect's Current Situation (S<sub>1</sub>)

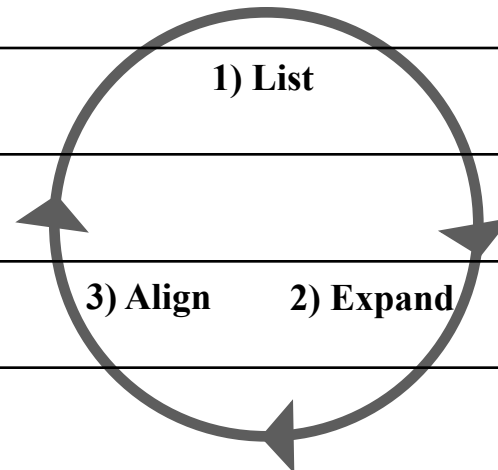
*“What is happening today that the Prospect would like to change?”*

Prospect's Triggering Event, Problem, and Its Effects  
(Including Lack of Benefits and Downside Risk of Doing Nothing)

*Triggering Event:*

*Single Overriding Problem\*:*

*Effects Of Problem:*



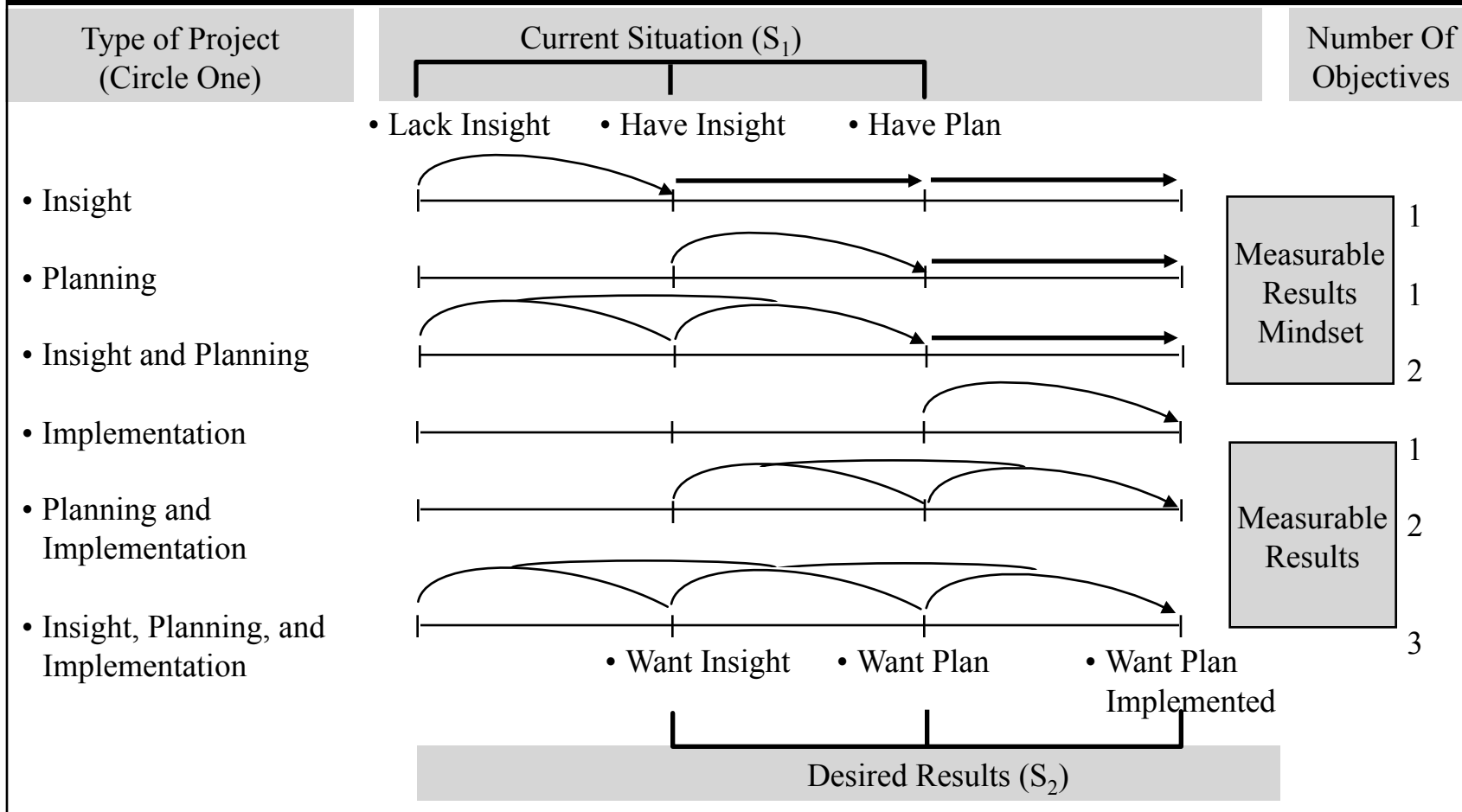
\* Align with the dominant overriding question in Cell 4

# Logics Worksheet

Cell 3

## Prospect's Perception of Project

*"How does the Prospect perceive their current situation relative to their desired result(s)?"*



# Logics Worksheet

Cell 4

Prospect's Overriding Questions

*“Given the number of objectives (noted in Cell 3), what overriding question(s) does the Prospect want answered to improve the current situation?” (List one overriding question per objective)*

Prospect's Single Overriding  
Insight Question\*

■ \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_?

Prospect's Single Overriding  
Planning Question\*

■ \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_?

Prospect's Single Overriding  
Implementation Objective†

■ \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\*To state the project objective, rephrase the overriding question, using an active verb

†Implementation projects have no overriding question

Prospect's Desired ***Insight*** Result (to be achieved after Insight Question is answered)

■ Insight/knowledge regarding...

\_\_\_\_\_

**Deliverables**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Prospect's Desired ***Planning*** Result (to be achieved after Planning Question is answered)

■ A Plan to/for...

\_\_\_\_\_

**Deliverables**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Prospect's Desired ***Implementation*** Result (or Measurable-Results mindset if not an Implementation Project)

■ An Implemented Plan to/for...

\_\_\_\_\_

**Deliverables**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

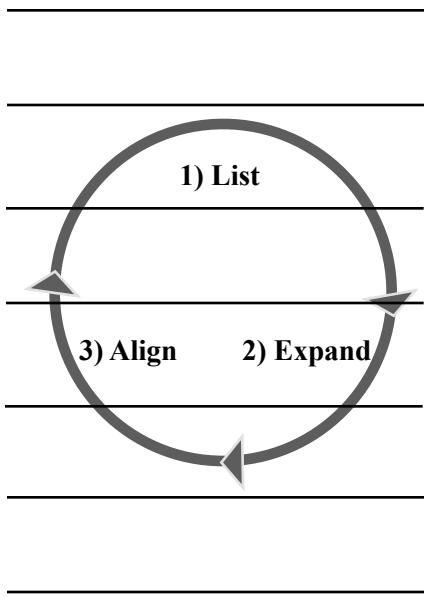
# Logics Worksheet

Cell 6

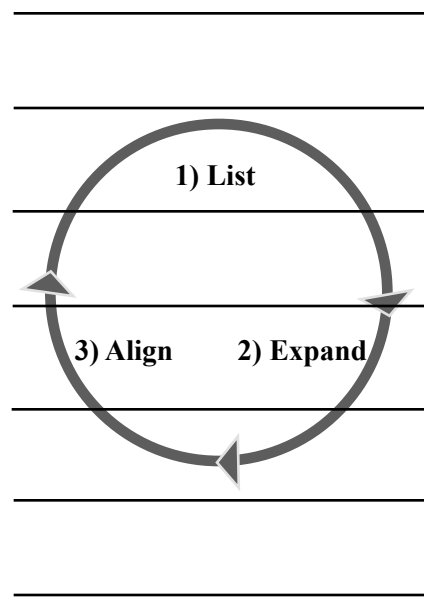
Expected Benefits (B)

*“What beneficial effects will accrue to the Prospect as/after their desired result(s) are achieved?”*

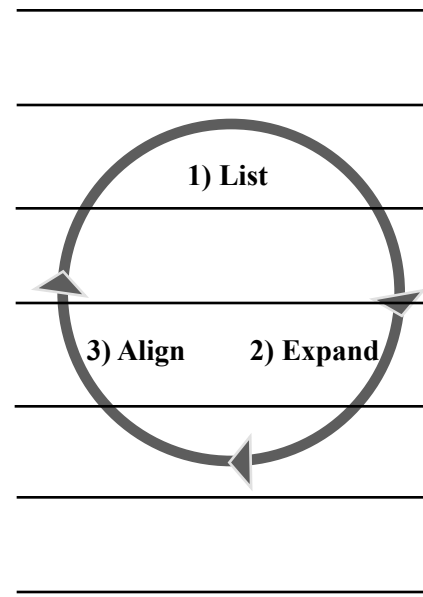
Benefits from  
Gaining Insight  
(Non-Measurable)



Benefits from  
Having a Plan  
(Non-Measurable)



Benefits from  
Implemented Plan (Measurable  
and Non-Measurable)



# Psychologics Worksheet

Cell 1

Individual Buyers' Titles, Roles, and Benefits

*“What benefits will accrue to each buyer as/after the desired result(s) are achieved?”*

Buyer/Title	Buyer Role(s)					Based on their respective roles, each buyer's . . .	
	E	U	T	C	R	Benefits from <i>Insight or Plan</i>	Benefits from <i>Implementation*</i>
1							
2							
3							
4							
5							

\*If proposed project does not involve implementation, use measurable-results orientation to indicate tangible benefits buyer could achieve subsequent to implementation

# Psychologics Worksheet

Cell 2

Hot Buttons

*“What desires or concerns of each buyer must be addressed?”*

Buyer's Hot Buttons*	How Addressed	SA	M	PO	Benefits to Each Buyer from Addressing His/Her Hot Buttons
1					
2					
3					
4					
5					

\*Hot button: process-related desire or concern of a buyer that will affect your sales approach (SA), project's methodology (M), and/or project organization (PO) . . . often personal, having emotional rather than technical content. Use single words or short phrases such as:

- Thorough, integrated, balanced, or flexible approach
- Urgency (e.g., to get quick results)
- Creativity
- Control
- Fear or change
- Project Complexity
- Objectivity
- Sensitivity to . . .
- Involvement
- Teaching/training



# Psychologics Worksheet

Cell 3

Buyer Receptivity

*“How receptive is each buyer to your efforts to date?”*

	Power Base			Receptivity				Rationale for Your Ratings
	L	M	H	--	-	+	++	
1								
2								
3								
4								
5								

# Psychologics Worksheet

Cell 4

Evaluation Process/Criteria

*“What process/criteria will the buying committee use, collectively?”*

“What is the prospect’s budget for this project?”

“How will the selection decision be made?”

“What collective evaluation criteria will be used?”

Knockout

Relative Weighting

1

2

3

4

5

**100%**

# Psychologics Worksheet

Cell 5

Competition

*“Based upon the evaluation criteria, how does the prospect compare you with competitors?”*

Competitors		Considering the Prospect’s Evaluation Criteria for <i>This Opportunity</i> . . .	
		Competitors’ Strengths	Competitors’ Weaknesses
• In-House/Other Initiatives			
•			
•			
		Your Strengths	Your Weaknesses
• You			
“How might you counter competitors’ strengths or exploit their weaknesses?”		“How might competitors counter your strengths, exploit your weaknesses, or redefine the overriding question?”	
•		•	
•		•	
•		•	

# Psychologics Worksheet

Cell 6

Themes

*“What repeated messages best characterize the Prospect’s story and/or differentiate you?”*

Themes Come from Hot Buttons, Evaluation Criteria, and Counters to the Competition

1

2

3

4

5