AXE SUMMARY CHECKLISTS

Tags	Empty
AI summary AI	The document outlines the AXE Summary Checklists, detailing pipeline percentages, checklist details for AXE summaries, research, and methodology. It includes steps for mutual exploration and meetings with various personas involved in the decision-making process, emphasizing the importance of aligning with SFDC and confirming next steps in sales and customer interactions.
Last edited by	Chris Hughes
Last edited time	October 3, 2024 4:45 PM
Stage:	Empty

Add a property

Add a comment...

PIPELINE PERCENTAGE:

- **This section should always match SFDC.**

Instructions - Pipeline %

ACCOUNT PLAN - (% <60&):

- [ ] 30%
- [ ] 40%
- [ ] 50%

MUTUAL EXPLORATION - (% = > 60%):

- [ ] 60% (Information Sharing & Business Value Conversations)
- [ ] 70% (Resources & Decision Steps Conversations)
- [ ] 80% - Forecast (Exact Solution Conversations)
- [ ] 90% - Commit (Closing Meeting Scheduled)
- [ ] 100% - Closed

CHECKLIST DETAILS & NEXT STEPS:

Instructions - Checklist:

NEXT STEPS - SALES & CUSTOMER:

- [ ] Info Share & People Access - Confirm

I. AXE SUMMARIES (≤30%):

- [ ] GENERAL INFORMATION
- [ ] NUDGE REPORT LINKS
- [ ] AXE SUMMARY CHECKLISTS
- [ ] SUMMARY & CASE STUDY
- [ ] REFERRAL OUTREACH

I. AXE SUMMARIES (≤60%):

- [ ] GENERAL INFORMATION
- [ ] NUDGE REPORT LINKS
- [ ] AXE SUMMARY CHECKLISTS
- [ ] SUMMARY & CASE STUDY
- [ ] REFERRAL OUTREACH

II. AXE RESEARCH (≤40%):

- [ ] **CURRENT STATES**
  - [ ] Contacts
  - [ ] Locations
  - [ ] Applications
  - [ ] Security
  - [ ] White Space
- [ ] **SOLUTION:**
  - [ ] Solution Analysis
  - [ ] Competitive Analysis
- [ ] **PROSPECT:**
  - [ ] Prospect Deep Dive Analysis
  - [ ] Prospect Annual Report Analysis
  - [ ] Value Chain Analysis
  - [ ] Porter's Five Forces Analysis

II. AXE RESEARCH (≤70%):

- [ ] **CURRENT STATES**
  - [ ] Contacts
  - [ ] Locations
  - [ ] Applications
  - [ ] Security
  - [ ] White Space
- [ ] **SOLUTION:**
  - [ ] Solution Analysis
  - [ ] Competitive Analysis
- [ ] **PROSPECT:**
  - [ ] Prospect Deep Dive Analysis
  - [ ] Prospect Annual Report Analysis
  - [ ] Value Chain Analysis
  - [ ] Porter's Five Forces Analysis

III. THE AXE METHODOLOGY (≤50%):

- [ ] **1. CHALLANGE / INSIGHT**
  - [ ] Issues
  - [ ] Evidence
  - [ ] Impact
  - [ ] Context
  - [ ] Constraints
- [ ] **2. RESOURCES**
  - [ ] Time
  - [ ] People
  - [ ] Money
- [ ] **3. DECISIONS**
  - [ ] All Decisions
  - [ ] Decisions Timing
- [ ] **4. EXACT SOLUTION**
  - [ ] Solution
  - [ ] Deal Structure
  - [ ] Innovate - Flexibility
  - [ ] Innovate - Bias
- [ ] **5. CLOSING MEETING**
  - [ ] End In Mind
  - [ ] Key Beliefs
  - [ ] Questions
  - [ ] Next Steps
- [ ] **6. RESULTS:**
  - [ ] Yes
  - [ ] No
  - [ ] No Decision

III. THE AXE METHODOLOGY (≤50%):

- [ ] **1. CHALLANGE / INSIGHT**
  - [ ] Issues
  - [ ] Evidence
  - [ ] Impact
  - [ ] Context
  - [ ] Constraints
- [ ] **2. RESOURCES**
  - [ ] Time
  - [ ] People
  - [ ] Money
- [ ] **3. DECISIONS**
  - [ ] All Decisions
  - [ ] Decisions Timing
- [ ] **4. EXACT SOLUTION**
  - [ ] Solution
  - [ ] Deal Structure
  - [ ] Innovate - Flexibility
  - [ ] Innovate - Bias
- [ ] **5. CLOSING MEETING**
  - [ ] End In Mind
  - [ ] Key Beliefs
  - [ ] Questions
  - [ ] Next Steps
- [ ] **6. RESULTS:**
  - [ ] Yes
  - [ ] No
  - [ ] No Decision