

# The CLOSE conversation checklist

Following the CLOSE methodology enables sellers and marketers to challenge current thinking and persuade buyers to abandon the status quo and move forward with a purchase decision. Here's how:

1

**CHALLENGE:** What challenges can you help prospects tackle?

- Help uncover challenges the buyer may not realize or understand the implications of known, low-priority challenges
- Illustrate the seriousness of challenges with compelling commercial insights
- Communicate how the challenge manifests. Use customer use cases to paint a picture of the status quo

2

**LOSS:** What are the challenges currently costing them?

- Quantify the "cost of doing nothing"
- Tally these expenses as:
  - Unnecessary expense
  - Lost productivity, inefficient or error-prone processes
  - Potential risk and risk-related losses
  - Lost revenue or growth opportunities

3

**OPPORTUNITY:** What is the value of addressing the challenge?

- Communicate the potential business benefits of solving the challenge
- Tie the impact back to business metrics or value drivers
- Quantify the results as:
  - Cost savings or avoidance
  - Improved productivity and business processes
  - Reduced risk
  - Improved revenue growth

4

**SOLUTION:** What solution can deliver these business benefits?

- Document specific solutions to address the prospect's unique challenge and deliver the proposed business benefits
- Communicate the differentiating components of your solution and features that can impact business value drivers

5

**EVIDENCE:** How can you assure the proposed solution can deliver?

- Validate how similar customers have used the proposed solution(s) successfully and the business value achieved
- Quantify specific customer benefits, positive KPI metrics, financial business benefits, and ROI