

Blue Sheet Overview

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Strategic Selling® Strategic Analysis

The Blue Sheet is an electronic version of the Strategic Analysis Worksheet you learned how to use in Strategic Selling®. A Blue Sheet is launched from the opportunity record in your CRM.

The Blue Sheet was designed to assist you in managing your opportunities for single sales objectives. It continues the Miller Heiman Group™ philosophy of interaction with thinking as an easy to use, intuitive user interface, while linking to your organizations' customer relationship/sales force automation contact management system. Real time data interchange with real time results!

The screenshot displays the Blue Sheet Overview interface, a complex web-based tool for strategic analysis. The interface is organized into a grid of numbered sections (1-13) and includes a top navigation bar with options like 'Additional Notes', 'Managers Notes', 'Help', 'Save', and 'Exit'. The main content area is divided into several key sections:

- 1. OPPORTUNITY DETAILS:** Includes fields for Author, Date, Salesperson, Account (V8 T2 SR 1 test account), Current Volume (140,000,000.222), and Potential Volume (100,000,000.000).
- 2. SINGLE SALES OBJECTIVE:** Shows Product (Blue Sheet Final Test), Revenue (3,607,199,254,740,992), and Close Date (02/28/2013).
- 3. ADEQUACY OF CURRENT POSITION - OK:** A summary section.
- 4. COMPETITION / SALES FUNNEL:** Includes Competition Type (Please select), Place in Sales Funnel (Above), and Timing For Priorities (Please select).
- 5. SPECIFY COMPETITORS:** A table with columns for competitor name and type (e.g., 'test comp', 'Only Alternative').
- 6. IDEAL CUSTOMER PROFILE:** A table listing five profiles with associated scores (e.g., 'Ideal customer profile 1' with score +4).
- 7. BUYING INFLUENCES INVOLVED:** Lists individuals like Arthur Song, CEO, United Oil & Gas Corp. and Ashley James, VP, Finance, United Oil & Gas, UK.
- 8. BUYING INFLUENCE'S KEY WIN- RESULTS:** Shows results like 'Highly Probable!'.

| |
|------------------|
| 00000hhj |
| Highly Probable! |
- 9. HOW WELL IS BASE COVERED?:** Shows scores like +2 Interested and +5 Enthusiastic Advocate.
- 10. SUMMARY OF MY POSITION TODAY:** A section with 'STRENGTHS' and 'RED FLAGS'.
- 11. POSSIBLE ACTIONS:** A list of actions such as 'Review Blue Sheet Strategy with Manager' and 'NOT STARTED NORMAL'.
- 12. BEST ACTION PLAN:** Shows a plan with a start date of 04/23/2013 and status 'Not Started'.
- 13. INFORMATION NEEDED:** A section for identifying needed information.

Fig. 6, Blue Sheet Overview

- [Click here for Toolbar Navigation information](#)
- [Click here for information on Icons and their Functions](#)

- 1. Opportunity Details** - Displays a summary of the basic opportunity information from your CRM.
- 2. Single Sales Objective** - This shows what the sales objective is, the expected revenue figure

and the opportunity close date.

3. Adequacy of Current Position - Enables you to assess how you feel about your probability of success in this opportunity relative to this Single Sales Objective.

4. Competition / Sales Funnel - Displays a summary of the Competition Type, Place in Sales Funnel, and Timing For Priorities.

5. Specify Competitors - This shows the known competitors with this opportunity.

6. Ideal Customer Profile - A predictive device to help you determine which customers will be your best prospects and to distinguish them from the ones who will prove to be liabilities.

7. Buying Influences Involved - Directly relates to anyone who has a positive or negative impact on your selling activity.

8. Buying Influence's Key - Win Results - This shows the key win results for each buying influence.

9. Buying Influence – How Well Is Base Covered? – Allows you to rate how the buying influence feels about your proposed solution, and provide evidence to support the rating.

10. Summary of My Position Today - Displays a summary of the Strengths and Red Flags.

11. Possible Actions - Displays a list of all your possible actions.

12. Best Action Plan - Displays a summary of the Possible Actions flagged as Best Actions.

13. Information Needed - Shows additional information that may be needed to help win/understand the opportunity.

When using the Blue Sheet on your mobile device then the responsive view is displayed as:

Toolbar icons are accessed via the three dots icon in the top right.

OPPORTUNITY DETAILS 1 0 0

| | |
|------------------|-----|
| Author | |
| Date | |
| Salesperson | |
| Account | |
| Current Volume | 100 |
| Potential Volume | 200 |

SINGLE SALES OBJECTIVE 2

| | |
|------------|---------------------------|
| Product | Ian staging test opp |
| Revenue | 1,000 |
| Close Date | 03/31/2018 📅 |

ADEQUACY OF CURRENT POSITION - COMFORT 3 0 0

COMPETITION / SALES FUNNEL 4 0 0

| | |
|-----------------------|-----------------|
| Competition Type | (Please select) |
| Place In Sales Funnel | Universe |
| Timing For Priorities | (Please select) |

SPECIFY COMPETITORS 5 0 0

| | |
|--|--------------|
| Description, My Position vs. Competition | ↓ ↑ ⋮ ⊕ |
| ☰ the enemy | Front Runner |

IDEAL CUSTOMER PROFILE 6 0 0

| | |
|--------------------------|------|
| Criteria, Score | |
| Ideal customer profile 1 | None |
| Ideal customer profile 2 | None |
| Ideal customer profile 3 | None |
| Ideal customer profile 4 | None |
| Ideal customer profile 5 | None |

BUYING INFLUENCES INVOLVED 7 0 0

| | |
|--|-------|
| Name, Title, Location, IR, DI, M, Key-Win Results Statement, Rating, Evidence to Support Your Rating | ↓ ↑ ⊕ |
|--|-------|

SUMMARY OF MY POSITION TODAY 10

| | |
|------------------------------|---------|
| STRENGTHS | |
| Description, Possible Action | ↓ ↑ ⋮ ⊕ |
| RED FLAGS | |
| Description, Possible Action | ↓ ↑ ⋮ ⊕ |

POSSIBLE ACTIONS 11

| | |
|---|-----------------|
| Description, When, Contact, Status, Type | ↓ ↑ ⊕ |
| ☰ Review Blue Sheet Strategy with Manager | |
| (PLEASE SELECT) | (PLEASE SELECT) |

BEST ACTION PLAN 12 SHOW CLOSED

| | |
|------------------------------------|-----|
| Description, When, Contact, Status | ↓ ↑ |
|------------------------------------|-----|

INFORMATION NEEDED 13

| | |
|---------------------------------|-------|
| What, When, Assigned To, Status | ↓ ↑ ⊕ |
|---------------------------------|-------|

Fig. 6b, Responsive Blue Sheet mobile view

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