

Buying Influences Involved

Last Modified on 09/15/2016 5:11 am EDT

Buying influences directly relate to anyone who has a positive or negative impact on your selling activity - whatever their position, company or role in a given sale. Buying Influences can be within your customer's organization, your own organization, or outside both organizations.

The Buying Influences section of the Blue Sheet displays a summary of Buying Influences Involved in the opportunity, their Key Win Results, and How Well the Base is Covered as in the following example:

BUYING INFLUENCES INVOLVED	BUYING INFLUENCE'S KEY WIN- RESULTS	HOW WELL IS BASE COVERED?
 Arthur Song, CEO, United Oil & Gas Corp. IR U DI M M G	The key win result for this buying influence is...	+2 Interested Here is my evidence to support my rating:....
 Ashley James, VP, Finance, United Oil & Gas, UK IR T, C DI H M G	here is Ashley's key win:....	+5 Enthusiastic Advocate My evidence for this rating is strong because....

Fig. 14, Buying Influences Involved

You can add, edit, and delete Buying Influences.

If your organization is also using the Relationship Maps tool, see **Blue Sheet Buying Influences** and **Relationship Maps** to understand how Buying Influence data is linked between the tools.

Adding a Buying Influence

- Click the Add icon to open a new row and add a Buying Influence.
- Image in the Buying Influences Involved section. The Buying Influence dialog box appears.

BUYING INFLUENCES INVOLVED			BUYING INFLUENCE'S KEY WIN- RESULTS	HOW WELL IS BASE COVERED?																					
Name, Title, Location <input type="text"/> Done <table border="1"> <thead> <tr> <th>IR</th> <th>DI</th> <th>M</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> Economic</td> <td><input type="radio"/> None</td> <td><input type="radio"/> None</td> </tr> <tr> <td><input type="checkbox"/> User</td> <td><input type="radio"/> High</td> <td><input type="radio"/> Growth</td> </tr> <tr> <td><input type="checkbox"/> Technical</td> <td><input type="radio"/> Medium</td> <td><input type="radio"/> Even Keel</td> </tr> <tr> <td><input type="checkbox"/> Coach</td> <td><input type="radio"/> Low</td> <td><input type="radio"/> Trouble</td> </tr> <tr> <td></td> <td></td> <td><input type="radio"/> Over</td> </tr> <tr> <td></td> <td></td> <td><input type="radio"/> Confident</td> </tr> </tbody> </table>			IR	DI	M	<input type="checkbox"/> Economic	<input type="radio"/> None	<input type="radio"/> None	<input type="checkbox"/> User	<input type="radio"/> High	<input type="radio"/> Growth	<input type="checkbox"/> Technical	<input type="radio"/> Medium	<input type="radio"/> Even Keel	<input type="checkbox"/> Coach	<input type="radio"/> Low	<input type="radio"/> Trouble			<input type="radio"/> Over			<input type="radio"/> Confident	Key-Win Results Statement <input type="text"/>	Evidence to Support Your Rating <input type="text"/> Rating <input type="radio"/> +5 Enthusiastic Advocate <input type="radio"/> +4 Strongly Supportive <input type="radio"/> +3 Supportive <input type="radio"/> +2 Interested <input type="radio"/> +1 Will Go Along <input type="radio"/> -1 Probably Won't Resist <input type="radio"/> -2 Uninterested <input type="radio"/> -3 Negative <input type="radio"/> -4 Very Negative <input type="radio"/> -5 Antagonistic Anti-Sponsor
IR	DI	M																							
<input type="checkbox"/> Economic	<input type="radio"/> None	<input type="radio"/> None																							
<input type="checkbox"/> User	<input type="radio"/> High	<input type="radio"/> Growth																							
<input type="checkbox"/> Technical	<input type="radio"/> Medium	<input type="radio"/> Even Keel																							
<input type="checkbox"/> Coach	<input type="radio"/> Low	<input type="radio"/> Trouble																							
		<input type="radio"/> Over																							
		<input type="radio"/> Confident																							

Fig. 14a, Adding a Buying Influence

These are the fields to enter in the Buying Influence section:

Name

Auto-populated list of CRM contacts associated with either the opportunity or the account (depending on how your System Administrator has configured your integration).

Buying Influence Roles

Multiple selection box with options describing the contact roles within the context of the opportunity (Economic, User, Technical, Coach). Although you can assign multiple roles to one contact, there should only be one contact defined with the Economic role per opportunity.

Degree of Influence

Single-select list of options for the contact's degree of influence within the Opportunity (High, Medium, Low).

Mode

Single-select list of options for contact's perception of the opportunity (Growth, Even Keel, Trouble, Over Confident).

Key Win Result

Free-form text input describing the Key Win Results important to the contact.

Evidence

Free-form text entry describing evidence of the rating selected.

Rating

Single-select list of options to rate how the contact feels about the opportunity (+5 to -5).

Complete the fields as desired and click Done. The Blue Sheet displays the new Buying Influence.

Editing an existing Buying Influence

Click on the row you want to edit and the row will open for editing. Edit the information as desired and click Done.

Deleting a Buying Influence

Click on the item you want to delete, then click on the Trash Can icon to delete it. A message will appear: "Are you sure you want to delete this item?" Select Yes, No or Cancel.

If no Economic Buying Influence is added, the following Warning will appear upon saving:

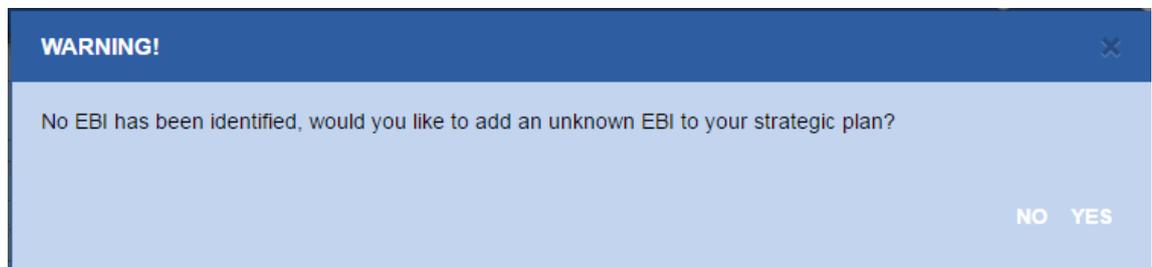


Fig. 14b, Buying Influence Warning

Selecting "Yes" to this prompt will automatically add an Economic Buying Influence with no name and a Red Flag icon will be placed on the name as something you'll need to find out. Note: Only Buying Influences with both the Name and the Role will be mapped out to CRM. Any Buying Influence missing either a name or a role will remain within the Blue Sheet only and will not be mapped out to CRM.

Blue Sheet Buying Influences and Relationship Maps

The Relationship Maps contact data and the Buying Influences data in the associated Blue Sheet for an opportunity are linked. If you add a Buying Influence in the Blue Sheet, that contact is added to Relationship Maps. If you delete a Buying Influence from the Blue Sheet, that contact is removed from the Relationship Maps. The converse of both of these examples is also true.