Buying Influences Involved

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:

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.

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:
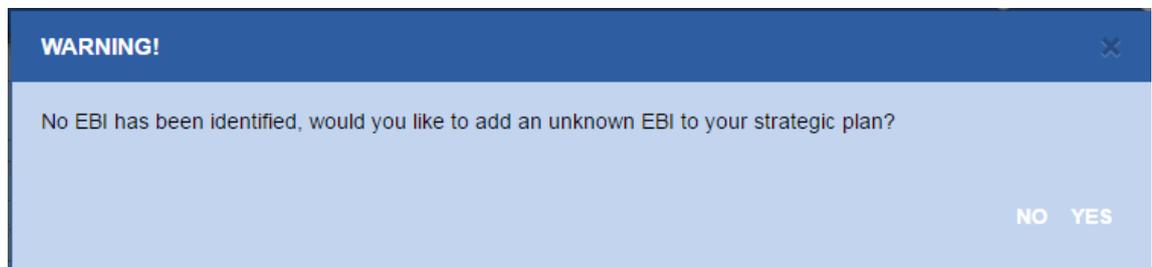

Fig. 14b, Buying Influence Warning

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.