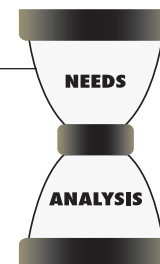


# Hourglass Needs Analysis Five Phases



## Phase 1 Rapport

- Make a personal connection, establish some rapport.
- Repeat your pre-call Contracting (clarify expectations—yours and theirs).
- Brief Agenda (make reference to the VBR you used to set the meeting).
- Discuss how we do business (use your PMR and/or capabilities brochure, if appropriate).
- Ask some easy-to-answer, not-risky Needs Analysis questions to continue establishing your credibility.

## Phase 2 Needs

- Probe for a broad range of potential needs, problems, challenges, and opportunities, some of which could turn into good assignments. (Refer to all your How Selling materials on great Needs Analysis questions.)
- Use the Needs/Notes steno-pad note-taking system.
- Circle those needs that may be an Assignment. It's an Assignment if it registers well on the Prospect's Richter Scale (it's important enough to lose sleep over and spend money to solve) and on Our Richter Scale (it's a problem in want of a solution we could deliver).
- Needs Phase may be complete when you have 2 or 3 promising Assignments.

## Phase 3 Assignment

- Summarize the needs you noted on your page.
- Ask if anything is missing from list.
- Ask prospect to prioritize them. *Which is most important? Most urgent?* Focus on the most important need you have the capabilities to address. Try not to reach beyond the second biggest.
- Test the emerging "Assignment" by asking questions about ROI measurement, already-existing plans, potential spending to solve the problem, and how soon the prospect wants to see potential solutions.
- Agree on one (or more!) Assignment. This is something the prospect wants help on and wants to work shoulder-to-shoulder with you on.

## Phase 4 Analysis

- Open up the questioning again. Now your intent is not to learn about a full range of potential needs, but to get in-depth information about the Assignment or Assignments uncovered.
- Ask these types of questions (you may want to use a few of these and then draft some of your own as well). *What makes this need important? What has prompted it to go to the top of your priority list? What makes it tough? What would success look like? What are some of the things you would need to see in the ideal solution? Why don't you have a solution already?*
- Floating Preliminary Ideas and Trial Balloons is a natural part of this process. You're not necessarily trying to solve the problem right then and there; rather, you're using these devices to learn more.

## Phase 5 Contracting

- Ask the prospect, *What else should we be talking about?* — plus *Do you have any questions for me?*
- Agree on the next steps in the process. Announce your tasks. Leave the prospect with at least one task.