

Opportunity Relationship Gaps and/or Risks Worksheet **Coaching Guide**

OPPORTUNITY #1	Customer / Prospect: Click or tap here to enter text.		Opportunity Name: Click or tap here to enter text.	
	Player / Stakeholder Name	Type	Primary Opportunity Role	Relationship Gap or Risk / Influence & Impact Risk (if any)
	<p>1a <i>Can he/she identify all the appropriate players for an opportunity? Can he/she identify where there are or might be unknown players?</i></p> <p><i>KEY QUESTION: What opportunity roles are missing? What evidence do you have that these are the only people who will be directly involved in the opportunity? What other outside influencers might these players consult on issues related to the opportunity?</i></p>			<p>1b <i>Can he/she identify and articulate multiple gaps and risks across the collection of players for an opportunity (i.e. Everyone can always improve their opportunity relationships)?</i></p> <p><i>KEY QUESTION: What relationships need to be improved? With whom do you need to build more trust, or gain more access, or improve your understanding of their motivation factors?</i></p>

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	Customer / Prospect: <small>Click or tap here to enter text.</small>	Opportunity Name:	<small>Choose an item.</small>			
Relationship Management Issue	Relationship Gap or Risk Type:	<input type="checkbox"/> Relationship Gap or Risk <small>(check all that apply)</small>	<input type="checkbox"/> Impact or Influence Gap or Risk <small>(check all that apply)</small>			
	Current Relationship Situation: <small>(briefly describe)</small>	<p style="font-size: 2em; color: red; margin: 0;">2</p> <p style="color: red; margin: 0;"><i>Can he/she articulate and categorize the identified Gap or Risk; can he/she articulate why this gap or risk is important?</i></p> <p style="color: red; margin: 0;"><i>KEY QUESTION: What is the nature of this gap or risk? Why is this Gap or Risk of concern for you?</i></p>	Opportunity Player Involved (if any) Name, Title and Company <small>(Include Company if not Customer / Prospect Employee)</small>			
	Desired Relationship Situation: <small>(briefly describe)</small>	<p style="font-size: 2em; color: red; margin: 0;">3a</p> <p style="color: red; margin: 0;"><i>Can he/she briefly describe the current relationship situation that requires improvement or attention.</i></p> <p style="color: red; margin: 0;"><i>KEY QUESTION: What is the current status of this relationship or situation?</i></p>	Opportunity Role <small>(Check all that apply)</small>	Access	Trust	Assigned To
	<p style="font-size: 2em; color: red; margin: 0;">4</p> <p style="color: red; margin: 0;"><i>Can he/she briefly describe the desired relationship situation.</i></p> <p style="color: red; margin: 0;"><i>KEY QUESTION: What specifically do you want to see happen in this relationship or situation?</i></p>	<p style="font-size: 2em; color: red; margin: 0;">3b</p> <p style="color: red; margin: 0;"><i>Can he/she articulate and defend the relationship characteristics for this stakeholder.</i></p> <p style="color: red; margin: 0;"><i>KEY QUESTION: On what did you base your evaluation of trust level?</i></p>	Motivation Factors <small>(How is this player measured or what metrics does this player care the most about)</small>			
	Action Plan to Achieve Desired Situation					
	Action / Task		Due Date	Owner		
<p style="font-size: 2em; color: red; margin: 0;">5</p> <p style="color: red; margin: 0;"><i>Can he/she articulate a well-thought out and detailed action plan of how to achieve the desired relationship status or situation.</i></p> <p style="color: red; margin: 0;"><i>KEY QUESTION: What specifically do you need to do, when? How will that action help you achieve the desired results?</i></p>						