Customer needs analysis

This template provides a list of questions to help profile a customer’s needs and buying behaviors. You can use it to:

* Help qualify the lead and identify the route to the key decision-makers
* Inform your sales pitch to make it clear how your solution will benefit them
* Simplify the lead’s journey to purchase (According to Gartner, 77% of buyers state that their last purchase was very complex or difficult)

The examples given below are based on the analysis of a sales rep pitching video conferencing software.

| **[NAME OF COMPANY: Fake Belief Accounting]**  **Customer pain points** | **Analysis Complete?** |  | **How can our solution support them?** |
| --- | --- | --- | --- |
| **Key pain point #1** | Y/N | *Struggling to gain market recognition* | *E.g. Accelerate brand awareness through more efficient touchpoints with clients* |
| **Key pain point #2** | Y/N | *Scalability* | *E.g. Allows management to confidently hand over processes to execs and focus on business growth* |
| **Key pain point #3** | Y/N | *High customer churn* | *E.g. Streamlines processes for higher client satisfaction* |
| **Are they resulting in lost revenue/lost customers?** | Y/N | *Yes (see report below)* |  |
| **How are they currently addressing them?** | Y/N | *- Manual processes*  *- Archaic software*  *- Ineffective integrations*  *- Outsourcing* |  |
| **Can they continue to operate without solving these issues?** | Y/N | *Yes, but inefficiently and could be losing ground to competitors* |  |
| **Can you quantify the dollar amount (per year) lost by not solving these problems?** | Y/N | *Yes - we have a report based on bespoke financial analysis, Forrester research &* |  |
| **Decision-makers - individuals** |  | **What are their current pain points? How are they currently addressing then?** | **How can our solution support them specifically?** |
| **Department #1 - Sales** | Y/N |  |  |
| **Department #2 - Marketing** | Y/N |  |  |
| **Decision-makers - individuals** |  |  | **What are their current pain points? How are they currently addressing then? How can our solution support them specifically?** |
| **Decision-maker #1: name & job title** | Y/N | *Charlie Webb, Account Director* |  |
| What are their responsibilities? | Y/N | *Ensuring client retention, planning budgets for account management, performance evaluation & feedback* |  |
| What are their key motivators (how will the solution affect their goals/responsibilities)? | Y/N | *Struggling to gain market recognition* |  |
| How accessible are they? Who are the gatekeepers? | Y/N | *PA Martine Smithe, does not take sales calls; asks cold callers to email* |  |
| Who do they report to? | Y/N | *CEO* |  |
| **Decision-maker #2: name & job title** | Y/N |  |  |
| What are their responsibilities? | Y/N |  |  |
| What are their key motivators (how will the solution affect their goals/responsibilities)? | Y/N |  |  |
| How accessible are they? Who are the gatekeepers? | Y/N |  |  |
| Who do they report to? | Y/N |  |  |
| **Decision-maker #3: name & job title** | Y/N |  |  |
| What are their responsibilities? | Y/N |  |  |
| What are their key motivators (how will the solution affect their goals/responsibilities)? | Y/N |  |  |
| How accessible are they? Who are the gatekeepers? | Y/N |  |  |
| Who do they report to? | Y/N |  |  |
| **The customer’s buying process** |  |  |  |
| What is the customer’s usual process for supplier selection: |  |  |  |
| - Solution research/ exploration | Y/N | *Word of mouth; recommendation* |  |
| - RFI/RFP process | Y/N | *No official tendering process* |  |
| - Approval/  validation cycle (specifically)? | Y/N | *CEO has a strong voice in selection and likes to get heavily involved in pitching process* |  |
| - Characteristics of previous successful suppliers | Y/N | *Connections of CEO and/Corporate Secretary* |  |
| - Other | Y/N |  |  |
| What is the propensity to buy? | Y/N | *Medium/High - contract period with current provider due for renewal in 3 months* |  |
| What is the priority level? How immediate is the need? | Y/N | *Medium - not currently a main priority* |  |
| **Budget** |  |  |  |
| What is the budget available? |  |  |  |
| Who controls the budget? |  |  |  |
| What is the approval/sign-off process to access the budget? |  |  |  |