DISCUSSION DOCUMENTS

This document accompanies the Total Inter Action Discussion Document template.

The notes in red (top right hand corner] are there to help participants use this template to develop these Discussion Documents. Note the template should be updated to follow your company's corporate guidelines.

A Discussion Document sits somewhere between a Quote and a Proposal.

Its power is in its simplicity, name and content:

Its simplicity -
These documents take little time to produce but they are often more effective than a Proposal.

Its name –
At the end of a discovery meeting/s the customer/client agrees to discuss a 'Discussion Document'. This is then followed up by setting a time to 'discuss' the doc (ie they are not sent a prop/quote).

In that next meeting, the user runs through the Discussion Document checking-in with the customer/client that the needs are correct, and that nothing has changed. They may end up writing over their copy of the Discussion Document and making more notes – ie it is a 'working' document.

Just getting back in front of the customer/client (rather than sending a Proposal or Quote) has proven to decrease the sales cycle.

Its content –
The Discussion Document headings force the user to ask questions that uncover needs (Challenges and Outcomes). From a Manager's point of view, you can take one look at the document before it goes out to see if the right information has been uncovered for a business value solution.

The valuable information from the Discussion Document can also be integrated into SFDC along with the other tools used in the training.

The outcomes are what the customer/client said they wanted (these are key). They come just before the Pricing/Costs (very important). This way the customer/client equates value to cost - basically they clearly see how they get the value they want for the money.