

WITT REPORT

Frame the opportunity. Read the room. Measure the Contrast. Align the Win.

OPPORTUNITY FRAME

What's important to them — and why?

ACCOUNT / PROSPECT

DATE

SALESPERSON

SINGLE SALES OBJECTIVE

MY POSITION

☐

Only alternative

☐

Front runner

☐

50/50

☐

Zero

FIT + READINESS

Score 1 = weak through 5 = ideal. Don't force a score in the first conversation.

IDEAL BUSINESS FIT

1. Leadership engagement
2. Transparent dialogue
3. Partnership mindset
4. Investment mindset
5. Improvement matters

TOTAL / 25

IDEAL OPPORTUNITY READINESS

1. Urgency tied to impact
2. Defined Win
3. Decision-maker access
4. Influence alignment
5. Real timeline

TOTAL / 25

BUYING INFLUENCES INVOLVED

Role = how they see it. Mode = how they feel. Win = why. Improvement = buy.

Understand their Win. Identify the Improvement. Read their Mode. Close the Gap.

NAME / TITLE / LOCATION	ROLE	DEGREE	MODE	VALUE LENS	WIN-IMPROVEMENT STATEMENT

STRATEGIST CADENCE

Use curiosity + empathy. Capture their words, not your interpretation.

WHAT What are you most focused on improving?**HOW** How are you handling that today?**WHERE** Where does the experience fall short?**IF** If that were solved, what would change?

SUMMARY OF MY POSITION TODAY

Know how we win. Own why we lose. Choose the best action.

STRENGTHS / WHY WE WIN

RED FLAGS / WHY WE LOSE

BEST ACTION PLAN

WHAT

WHO

WHEN

YOUR MEETING OBJECTIVE

Leave knowing what they want to improve — and who helps decide what happens next.