

# 7 Tips for Creating a Customized Value Analysis

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## 1. Identify the Customer

I would recommend creating a Customized Value Analysis for customers you know very little about but are looking for a door opener and for the whitespace among your current customers. In the commercial and enterprise space, we see this used a lot more for customers we know very little about.

## 2. Keep it Transparent and Invite them to Collaborate

Each of the Customized Value Analyses that are sent out are always attached to an invitation for the customer to collaborate with us to help them better understand their problem and the solution. They are completely transparent and the method in which we create them gives the customer the ability to validate whether they could see a similar impact.

## 3. Leverage What You Know

Don't get hung up on not knowing much about your customer--or knowing too much. Where we don't have a lot of information, we'll use the templates and intelligent defaults we have and scale it to their size. For the customers we know more about, let's use what we can to make it as relevant as possible.

## 4. Send it in a Format that's Convenient to Your Customer

The reports we generate are in Word, PDF, or PowerPoint format and can be sent any way you see fit. We've seen them printed and shipped, emailed with a brief cover letter, or taken to a customer meeting to be the centerpiece of conversation. Use your own judgement depending on the customer.

## 5. Make it Scalable by Using Best-Practice Templates

Given the nature of an "outside-in" point-of-view that is involved in creating a Customized Value Analysis, we or YOU are able to very rapidly build these by leveraging pre-existing templates and intelligent defaults to quantify pain points. A best practice would be to scale the Analysis to what you believe is reflective of your customer (user count, number of clients, total data, etc.).

## 6. Remember, it's Not a Silver Bullet – But Your Effort Goes a Long Way

Inevitably, I'm sure that some of your Customized Value Analyses will be met with the "delete" key. It's not a silver bullet. Generally though, the response from the customer tends to be positive and appreciative given the transparency and educational benefit. In one of the more successful scenarios, an account manager that used this practice immediately became a frontrunner for his customer, compressed his sales cycles by about 50% and was able to prevent discounting as a result of showing value upfront.

## 7. Don't Save Value for a Last Stage Buying Conversation

People often reserve quantified value studies for the purchase phase of the buyer's decision making process. It ends up being something they do to finish out their deals rather than generate net new opportunities. Certainly I wouldn't want to dissuade anyone from quantifying value to help close a deal, but I strongly encourage you to consider using a similar approach to help uncover and grow your deals.