|  |
| --- |
| **Opportunity Generation Programme Checklist** |
| ***Programme Component*** | ***Requirements*** | ***Owner*** | ***Completion Date*** |
| **Key Dates** | *Agree Initiation & Ramp-up start dates, calling activity start and duration* |  |  |
| **Define Goals & Objectives** | *Objectives understood**Specific goals agreed* |  |  |
| **Market Segmentation completed** | *Focus understood* |  |  |
| **Market Proposition in place** | *Proposition defined* |  |  |
| **Key individual propositions** | *Key script bullet points in place* |  |  |
| **Qualification Criteria in place** | *Key criteria for qualification criteria defined* |  |  |
| **Campaign Briefing** | *Briefing date and attendees required* |  |  |
| **Campaign Literature** | *Email templates, letter templates and other campaign specific material* |  |  |
| **Case Study and References material** | *What literature is available to support the process, could include analysts comments* |  |  |
| **Other Supporting Literature** | *Corporate literature received, website updated* |  |  |
| **Opportunities generated process** | *Named individuals, process, and handover form agreed* |  |  |
| **Reporting Agreed** | *Verbal and written**Weekly/Fortnightly& Monthly* |  |  |
| **Data Source** | *Internally or externally* |  |  |
| **Data Protection** | *Data protection - Telephone Preference Checks (TPS)* |  |  |
| **Data Transfer**  | *How and when it will happen* |  |  |
| **Resource Allocated** | *Customer & Business* |  |  |
| **Internal Campaign Briefing** | *Briefing for Business Development Executives* |  |  |
| **Aliases implemented** | *Telephone, email & fax details agreed for responses* |  |  |
| **Pre Launch Meeting** | *To agree all activity is in place for successful project launch.* |  |  |
| **Customer Sign off** |  |
| **Signature** |  |
| **Business Sign off** |  |
| **Signature** |  |