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Assess customer fit and profitability

Evaluate five target accounts using evidence and consistent economics.

Complete one sheet per account, then compare five sheets as a team. Fit and current purchase intent are different. Use supported / uncertain / poor fit for each dimension, with the evidence behind the label.

How to use this worksheet

1. Describe the customer's problem and a buyer-confirmed trigger.

2. Check buying access, proof requirements and delivery fit.

3. Estimate the contribution using cost categories defined with finance.

4. Choose pursue, nurture, or disqualify; record why and what evidence would change the decision.

Worked illustration

Illustrative monetary units: revenue 100,000 less delivery 45,000, onboarding/travel 15,000, commission 10,000 and account-specific support 20,000 leaves 10,000 before fixed overhead, financing and tax. Avoid double-counting costs. This is simplified contribution, not net profit.

A willing buyer may be a poor commercial fit. An attractive account may have no current intent. Use account evidence rather than nationality or broad cultural assumptions.

Your working record

Account / segment / owner / review date

Problem fit and trigger / evidence / status

Buying access and proof requirements / evidence / status

Delivery capacity, language and service needs / evidence / status

Revenue estimate, cost categories and simplified contribution

Payment timing, cash exposure, scope risks and capacity tradeoffs

Decision: pursue / nurture / disqualify, and reason

Missing evidence / next action / owner / decision review