Introduction-to-Opportunity Evidence Card

Turn an introduction into a reviewable decision without treating interest, access or job title as proof of intent.

Reusable working template

1 · Prepare the introduction

Source, permission and relevant context

Facts / third-party claims / hypotheses / unknowns

Useful opening and scope boundary

> Why separate the categories? An introducer's confidence is not the buyer's statement. A relevant conversation can start while commercial intent remains unknown.

Original Tibyan working aid, not a validated assessment. All examples are hypothetical; no reader testing or field validation completed. Keep sensitive data out of shared copies.

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2 · Capture buyer evidence

Current task, issue and concrete example

Role and relevant people

Contrary evidence and missing information

> An expressed issue supports further discovery; it does not establish a purchase. Continue with the existing discovery/business-case guide where appropriate.

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3 · Agree the next evidence step

Buyer purpose and useful output

Owners, permission and timing to confirm

Promises, follow-through and limits

> A good next step has a buyer purpose. The supplier sending a deck is not equivalent to the buyer agreeing to evaluate a project.

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4 · Decide status and review

Active opportunity / relevant follow-up / not-now

Evidence required to change the status

Review, learning and evidence still needed

> Warmth and trust matter in a relationship, but this card does not measure trust or prove conversion. Preserve the option to stop or remain in follow-up.

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Turn an introduction into a reviewable decision without treating interest, access or job title as proof of intent.

Completed hypothetical example — all facts and decisions invented

1 · Prepare the introduction

Source, permission and relevant context

A fictional local introducer connects the monitoring supplier to a maintenance manager. The manager permits a relevant exploratory conversation. No wider permission to circulate customer information is assumed.

Facts / third-party claims / hypotheses / unknowns

Fact within the fiction: the contact is a maintenance manager. Introducer's claim: 'They want the solution.' Hypothesis: reporting problems may be relevant. Unknown: actual need, investment project, purchasing role, timing and budget.

Useful opening and scope boundary

'Would it be useful to understand how you currently review maintenance reports, before we discuss whether our package is relevant?' Do not promise savings, dates or support coverage that have not been approved.

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2 · Capture buyer evidence

Current task, issue and concrete example

In this invented conversation, the manager describes delays consolidating maintenance reports. The operational consequence and its scale still need examination. No quantified saving is asserted.

Role and relevant people

The manager says operations and IT would need to assess any next step. Do not treat this as confirmation of all decision-makers, authority or procurement rules.

Contrary evidence and missing information

There is no agreed investment project. Budget and decision timing are unknown. The manager may only be exploring. Record those limits rather than filling qualification fields with guesses.

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3 · Agree the next evidence step

Buyer purpose and useful output

In the fictional scenario, the manager agrees that a workflow review with the relevant operator could clarify the reporting problem. Desired output: a corrected current-workflow summary and remaining questions, not a premature proposal.

Owners, permission and timing to confirm

Supplier sales prepares a short agenda; manager seeks the operator's agreement. Schedule remains to be confirmed. Share notes only with permission. A proposed meeting is not a completed buyer action.

Promises, follow-through and limits

Send the requested scope note, invite correction and ask whether the review remains useful. Do not infer urgency from silence or put the contact into repeated generic follow-up without an appropriate basis.

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4 · Decide status and review

Active opportunity / relevant follow-up / not-now

Record a relevant exploratory follow-up for now. The hypothetical contact has confirmed an issue, but project scope, purchasing process and timeline remain unverified. Apply your organization's agreed entry criteria.

Evidence required to change the status

Seek the buyer's correction of the problem, appropriate role involvement and agreement on a relevant evidence task. Do not require invented certainty or a universal score; keep unresolved criteria explicit.

Review, learning and evidence still needed

Review when the buyer responds or the agreed follow-up date arrives. No actual case results or intended-reader tests exist. Needed: permissioned anonymized introductions, buyer-confirmed next steps, disqualified cases and Arabic/English usability review.

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