

Budget Authority Need Timeframe (BANT) Criteria Template v3.3

- Register only validated opportunities (SSM Stage 4 or higher)
- Refer to the SVI Operations Guide for additional details on BANT requirements.
- This BANT Criteria Template is considered **mandatory**. All fields are required.
- Opportunity records lacking descriptions of a Customer's Budget, Authority, Need and Timeframe (BANT) will be rejected as incomplete.
- Please save your attachment with a document name that includes the opportunity number and account name (example: "BANT for XYZ Company 1JF-ABCDE.doc")

1. END USER:

SVI Opportunity Number:	1JF-XXXXXX or 12KY-XXXXXX
Project Name: (Also enter the Project Name in the Description Field in the GPP tool.)	Name of the Project

List ALL names that customer does business as (DBA) including all abbreviations, parent company, divisions and subsidiaries.	
List of alternative account names	
An eligible End User is anyone, who is not part of the Enterprise of which you are a part, who acquires Products for its own use and not for resale. An Enterprise is any legal entity including the subsidiaries it owns by more than 50% percent.	
Is this End User part of the Enterprise of which you are a part?	Yes/No Please note as stated above an eligible End User for SVI is anyone, who is <u>NOT</u> part of the Enterprise of which you are a part, who acquires Products for its own use and not for resale. An Enterprise is any legal entity including the subsidiaries it owns by more than 50% percent.
Is this customer a government customer which includes Federal, State and Local government?	Yes/No Please note Public Sector End Users are <u>INELIGIBLE</u> End Users as defined in the IBM PartnerWorld Agreement – International Software Value Incentive Attachment.

2. PASSPORT ADVANTAGE: Your VAD can assist you in determining if the customer has a current Passport Advantage contract and advise you of the full legal name and address that appears on the contract.

Passport Advantage Agreement # (5 digits)	PA Agreement No.: 12345
Passport Advantage Site # (7 digits)	PA Site No.: 1234567
Does the customer have a Passport Advantage contract?	Yes/No
What is the Customer Name and Address as it appears on the Passport Advantage Contract (either current contract, or contract to be established) under which the licenses will be purchased and delivered to.	
Account Name/ Address (Please provide Postal Code as well) Example: Customer Account Ltd. 123 Application Str. London AB12 34BC	

In the GPP tool, enter the Sold-To Name and Address in the Account record.

3. BUDGET:

Describe how / if / when budget has been, or will be, identified and approved for this project.

Example: Budget in an amount of XXXX was approved in January and will be released in February.

4. AUTHORITY:

Include at least one Customer C-level or Line-of-Business Executive on the Contacts tab in the GPP record. First Name, Last Name, Title, Phone and Email are mandatory fields. Procurement and Purchasing contacts are not valid executive decision makers.

Example: John Smith, IT Project Manager, phone: +44-321-9654, email: john.smith@account.com

5 NEED:

What is the name of the suggested IBM middleware software? If available, please include the Passport Part Number(s) or full name of IBM Middleware being proposed for this solution.

Example: D5566LL-Tivoli Storage Manager

Please provide the product/ product part number you wish to sell to the customer. Please note that this product should belong to the Brand Family submitted in GPP.

Please check the products and the appropriate Brand Families in the SVI Eligible Part Numbers List on the following link: http://sc4.ihost.com/gpp/permanent/svi_eligible_part_numbers.pdf
The list is subject of continuous updates thus it is advisable to check the products and the Brand Families before submitting a new opportunity.

6 BUSINESS PROBLEM:

Describe the customer's business problem and the key benefits of the proposed solution using IBM middleware:

Customer's problem, Solution suggested to the problem.

7 TIMEFRAME:

What is the timeline of key decision milestones, and what decision criteria will be used?

Please provide **at least 2 dates** which are important in the customer's decision making. This section will allow us to see the progress of the project.

Examples:

01/01/2010 First meeting with the customer, problem analysis

01/02/2010 Presentation of solution

01/03/2010 Test installation

01/04/2010 Close of project

Enter the forecasted "close date" on the Revenue Tab in the GPP record. This is a mandatory field and must be at least 15 days from your opportunity submit date.

8. Opportunity Identification: Please tick the correct box below, to show who identified the opportunity.

Business Partner identified opportunity, eligible for Identify and Sell Fees.

Yes/No

IBM identified opportunity, eligible for Sell Only Fees.

Yes/No