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THE ROI AGENT COMPANY

S Quick Reference

FIELD GUIDE

ROI Pitfalls & Value-Selling Maturity

A one-page companion to the two whitepapers: the ten pitfalls that make ROI suspect, and the five levels of selling on value.

The 10 ROI Pitfalls

The traps that make an ROI number suspect. Full detail in the *10 ROI Pitfalls* whitepaper (Goldsmith & Sarno).

1 **Including Only Cost Savings**
Counting only saved costs — the "return" is costs *and* revenues.

2 **Ignoring the Solution's Useful Life**
Judging on the short term; ignoring cost and benefit over the full useful life.

3 **Not Including Time Value of Money**
Treating a future dollar as today's; no discounting to net present value.

4 **Revenue vs Expenses Dollar-to-Dollar**
Offsetting them 1:1 — only the margin portion of a revenue dollar is profit.

5 **Unsupportable Cost/Revenue Estimates**
Numbers with no rational basis; "justification" instead of analysis.

6 **Not Realizing Benefits**
Estimated savings never taken — headcount stays, costs shift, "five minutes a day."

7 **Separating Intangibles, Risk, Opportunity**
Quarantining them into a qualitative aside instead of quantifying all in money terms.

8 **Confusing Scenarios and Deltas**
Using a delta where a full scenario is needed — both compare to BAU / "No Change."

9 **Not Matching Actuals to Estimates**
Never checking projected vs actual; estimates drift from reality.

10 **Not Addressing the Right Variables**
Selling value the customer doesn't actually care about.

The 5 Value-Selling Maturity Levels

Levels 1–4 give modest gains; Level 5 is the breakthrough. Full model in the *Value Selling Maturity Model* whitepaper.

1
LEVEL 1

Not Selling on Value — ***"What is the seller selling?"***

Asking for the order without naming any value.

2
LEVEL 2

Differentiating Features — ***"How is it different?"***

Touting features; assuming features alone are what the customer values.

3
LEVEL 3

Benefits — ***"What benefits might they want?"***

Listing benefits with no proof the customer sees or values them.

4
LEVEL 4

(Ostensible) ROI & Calculators — ***"Best financial case?"***

ROI claims that are suspect — because they fall into the ten pitfalls above.

5
LEVEL 5

REAL Customer Value Selling Proposition — ***"What does the customer value, and what's it worth?"***

Their REAL requirements (Problem Pyramids™), linked to features (ROI Value Statements™), proven with REAL ROI™ on their own figures — the pitfalls avoided.

> **The through-line:** Level 5 is the only level that produces breakthrough results — and it depends on getting the ten pitfalls right. Everything WebROI and ROI Replay do is Level 5, operationalized: the customer's REAL requirements, the value case in their own dollars, and proof that avoids all ten pitfalls.