

Product/ Service Name

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Value Audit Checklist Item	Available	Reference
PRODUCTS & SERVICES		
Key Product/Service Overview		
Statement of Features, Advantages and Benefits,		
Statement on Patents and IP		
Product Strategy: <ul style="list-style-type: none"> ▪ Current Strategy, Core Modules & Functionality ▪ Product Packaging ▪ Pricing (licenses, support & services, fee charging structures) ▪ Product Direction ▪ Customisation ▪ Integration with third party products (APIs) 		
Technology Platform Adherence to industry standards and any major player endorsements (e.g. IBM, Oracle Microsoft etc.)		
Unique Value Proposition		
Brand Value Statement & Attributes		
MARKETS & STRATEGY		
Market Analysis (external focus), Market Sizes (geographies, segments)		
Key Competitors: SWOP Analysis (Strengths, Weaknesses, Opportunities and Threats)		
Target Markets (sectors and geographies), Preferred Customer Profiles		
Marketing Strategy (your current action plan including promotional and PR activities).		

SOFTWARE VALUE AUDIT CHECK LIST

Value Audit Checklist Item	Available	Reference
SALES STRATEGY & PLAN		
Sales Objectives (sales values and timescales)		
Sales Strategy & Plans (sales responsibilities defined, territories assigned, individual sales account plans and new business campaigns in place and reviewed)		
Target Customers (benchmarked against competitors features & customer needs)		
Sales Channels (defined objectives and plans for alliances, partnerships and influencers).		
Reference Customers (agreed reference users)		
BUSINESS GOALS & REVENUE ANALYSIS		
Business Goals (3-5 year time horizon, strategic and financial)		
5 year Revenue Analysis and Forecast (past 2, current and next 2) segmented by Licences, Recurring Licences (support) Services related to the product implementation, plus any add-on service lines, less any third party sales costs. R&D expenditure.		
Exit/Payback Strategy (comparable scenarios with competitors – benchmark reality, sanity check)		