

## **Tools for the well run business: Sales Qualification Checklist**

### **Summary:**

A checklist and notes for analysing sales leads and deciding whether/how to commit time and resources.

### **Benefits**

1. Stop wasting time on leads that have no reality or immediate budget behind them.
2. Stop chasing business you are unlikely to win.
3. Stop chasing business which it would be unprofitable to win.
4. Avoid being projects which are just “interesting”, or for “nice customers”.
5. Have better cross functional discussion by using common language and terms.

If you find this checklist useful and would like to see other tools, then please contact.

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<p><b>1. The Basics</b> Short name for this sales prospect? Sales person? Channel?</p>	
<p><b>2. Customer/Prospect's organisation</b> What does the customer do? Where is the customer based? Who is our main client contact? Role? Contact details? How do we come to be talking? (Recommendation from someone?)</p>	
<p><b>3. The Customer's Application</b> What is the application that the customer wants to create or improve? What does it do? How does it work today? Problems today? Volumes? Costs?</p>	
<p><b>4. Is there a real project and when will it come?</b> Why is there a project? Is there a formal, signed-off, project and/or a budget to go forward? Is it a priority or a "nice-to-have"? Identify <b>pain</b> – who's "shirt is on fire" until the solution is in place? What are the consequences if the customer does not solve its problem?</p>	
<p><b>5. What is the project/bidding process?</b> What are the phases and timing of the bidding process? Are there formal procurement rules to be followed? When is the decision taken and by whom? Who has the ultimate decision?</p>	
<p><b>6. Who are the personalities here?</b> <b>Economic buyer?</b> (the one who writes the cheque/has the budget) What is the attitude of the Economic Buyer to the proposed solution? <b>Business users?</b> Who? What issues keep them awake at night? <b>Technical recommenders?</b> What are the criteria (<i>and prejudices!</i>) they will use? Are there other internal or external <b>Influencers</b>? Do we have a <b>Coach/Champion</b>? Power and influence of the champion?</p>	
<p><b>6. What solution are we proposing?</b> Our elevator proposition – one sentence why they should buy and why they should buy what we are able to offer? Concrete, quantifiable benefits, savings, increased revenue, ROI What product would we offer? How much customisation would we have to do? How quickly would we deliver our solution into service?</p>	
<p><b>7. Business case?</b> What is the customer prepared to pay? What are our costs? Cash in/cash out in year 1 Cash in /cash out Year2 Cash in/cash out Year 3</p>	
<p><b>8. Competition and substitutes?</b> What is the competition? What other solutions could they consider? Decision Criteria – what are they? Do we meet them? What is the position of the competition? Why us?</p>	
<p><b>9. Other items?</b></p>	
<p><b>10. What next?</b></p>	