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The Successful Print Sales Circle

Worksheet 13: Qualifying prospects

Step 1: Outline the right prospect for you

Think about what makes the right client for you. Often, in the excitement of trying to make a sale, we waste time on prospects who are not going to convert or who could become clients who are not the right fit for your company. It is important to be rigorous when you select prospects. One process that will help with this is outlining what type of prospects are right for you and your company.

That is why it important to create a prospect profile, to make sure that you are talking to the right sort of person. Here is a list of questions that you should answer to help you with this process:

- What market sector(s) do you specialise in?
- What size of client are you looking for?
- Does it matter where your client is based?
- What typical products or services are your clients looking for?
- What typical business challenges are your clients facing?
- How do you help your clients improve their business results?

You may still find worthwhile prospects who do not fit this profile. However, if a prospect does not fit this profile, you should consider if you should be having a conversation with them or not.

You may have some different or additional questions to the ones that are listed above. But these will form a good starting point for you.

Write down your ideal prospect profile

Step 2: List your barriers

There are also a number of circumstances when you will not be able to work with a customer. Here are some of the issues that might prevent you from working with a company:

- You may require clients with a minimum turnover
- You may require a customer to agree to certain credit terms
- A customer will need to pass a credit check
- You may have particular requirements on how a customer supplies a job
- You may have terms and conditions of trading that a customer must comply with

Your list of requirements may vary. This list is intended as a way to start you thinking.

Create a list of events for each client. Make sure you have the dates for these events as well.

Create a qualification checklist

Step 3: Go for the no

During your initial conversation with a prospect, it is good to raise objections. First of all, this raises any deal breakers quickly. Just as importantly, you are encouraging a prospect to overcome their objections themselves. This means that they are taking a psychological step towards working with you.

You should use this part of a conversation to raise your barrier list but also to educate them about the type of company that you are. Here are other issues that it is worth raising:

- Price
- Turnaround
- Availability
- Any particular ways you work

Here are two scripts that you can use for raising objections:

We are not the cheapest of suppliers: instead we focus on [FEATURE]. Is that an issue for you?

Once clints have passed our credit check we offer maximum terms of 30 days credit with no exceptions. Will that be a problem?

Create your qualification scripts

Step 4: Ask more qualifying questions

Here are three questions you can add to the dialogue. None of these are designed to act as deal-breaker questions. However, the responses can tell you quite a lot about how the prospect works and if they are a good fit for you or not:

- Can you tell me more about your bidding process?
- What happens if I give you the right price?
- What do you want from your suppliers?

Step 5: Check your current prospects

Now is the time to see how your current prospects measure up. Use the table at the bottom of this worksheet to qualify the people you are currently speaking with.

This is a three-stage process:

- Carry out research on the internet to check how they fit in with the type of client that you are looking for
- Have a conversation or send an e-mail to check they pass all your barriers
- Build in steps 3 and 4 to future conversations

Review the month 2 upselling video and worksheet for more ideas.

Create an upsell for each event. What would this do to your revenue and profits if you sold it successfully?

Write down the answer to this question

Which prospects will you carry out this process on?

Step 6: Share your success!

The success for this task is a little unusual. You are being asked to disqualify prospects. However, the aim of this is to free up more time for you to talk with the type of people who make better customers for your organisation.

For this task, your goal is as follows:

- List at least ten prospects that you will carry out this programme on
- Aim to disqualify at least two prospects

This exercise should become part of your regular sales activity. It is important to review whom you are speaking to and to make sure that you are using your sales time in the most effective way. In addition, you want to make sure that new clients will work well with you and your company..

Fill in the table on the next page to measure your progress with this task. You may prefer to make a copy of it or create a spreadsheet. Remember, it is important to fill this in: this is your way to check that you are on track with this exercise and are taking action.

How did you find this exercise? Please share your results with us at circle@ProfitablePrintRelationships.com If you come across any challenges you will be able to raise them on the monthly group call. If you are a gold member you can ask any questions privately on your exclusive e-mail address.

	Client name	Passed barriers	Overcame objections	Passed qualifying questions	Qualifies as customer
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					