

Pre-qualify Leads for Success

Use this pre-qualifying questionnaire to conduct a phone interview before you schedule an appointment with a potential new customer/client.

1. How long have you been thinking about buying the product/service? (e.g. How long have you been thinking about implementing organization and training solutions to enhance your employees' skills?) (You want to find out if there is an urgency to purchase your product/service.)
2. May I ask you what product/service/company/provider/agent, etc. you are currently or thinking of using or working with? (You want to know who the competition is.)
3. What has been your experience with the product/service/company/provider/ agent, etc. you're currently using/working with? (This is an excellent question because human nature focuses on the negative, they will tell you everything they don't like about their current experience.)
4. What is most important to you when you're considering the purchase (working with) of this product/service? (This question identifies what they need, so you can satisfy their needs with value and /benefits.) (It will quickly identify how to position your products/services to close the sale.)
5. Do you usually make the final decision when you purchase a new product/service or are there other decision makers involved? (In today's market, generally there are multiple-layers of decision makers.) (It's critical to talk to all decision makers—the one you don't talk to could cost you the deal)
6. Could you please tell me the investment/cost you made for the product/service you have now? (You need to know, before you schedule an appointment, what the client/customer paid for the product/service they're using now. You want to determine the difference in cost between your product/service and what they last paid.) (The cost difference will be the value/benefits you offer the customer/client with the purchase your product/service.)
7. Have you done any research on the cost of this product/service? What would you be willing to pay for this product/service today? (Use if they've never purchased this product or service)(You want to see what their reality and expectation is about cost.)
8. Do you currently have a budget to make an investment in this new product/service?
9. How soon are you thinking about making an investment in product/service? (You want to know if they're serious to buy now.)
10. If I was able to offer you the best solution at an exceptional value, would you be ready to make an investment in this product/service? This is a critical question, because if they don't have plans to purchase in the next 30-90 days, (this varies with industry and product and service) you will want to schedule an appointment when they are closer to making a purchase)

11. Do you have any questions I can answer for you? (This will give you information on how you should proceed.) (If they start asking questions, tell them you will have all the information at the appointment.) (If it's not possible to schedule a meeting, you must create a spectacular written/or email presentation.)

I would like to schedule a meeting with you and the other decision makers, so we can discuss your special needs and I can show you how our product/service can provide benefit/value to you and your company. Would Monday or Tuesday work for you? Would the morning or the afternoon be better? Would 9:00 or 10:00AM be a good time for you? (Always ask open-ended questions and give them choices/options) (The above is a sample script of how to offer choices/options.)

Thank you for the opportunity to meet with you and the other managers/leaders/supervisors/engineer/etc. to discuss your special needs and how I can provide value/benefits to your company. I will see you on Monday, June 4th at 9:00AM. (This is a good example of how to end the call.)

Remember, gratitude, gratitude!! Show graciousness and appreciation for the appointment. This shows your respect and appreciation, to perhaps do business with them.

Resource: <http://www.themarketingcoach.us/index.html>