



SALES EARLY-STAGE QUALIFICATION SCORECARD

USE THIS QUALIFICATION SCORECARD in the early stages of any potential sales opportunities. The questions are particularly useful for identifying opportunities that are probably not going to warrant your sales efforts.

- 1 Rank your responses using a 0-10 scale where 0 = no knowledge or a very unattractive situation and 10 = a very attractive situation such as an urgent customer need that can be addressed by your offerings. Use the hints to guide your scoring. Note: if you can't answer a particular question because you don't know the customer well enough yet, just put a 5 at this stage. Then do your research and modify your score appropriately.
- 2 Add up your responses for a score out of 100. The higher the score, the more attractive is the opportunity and thus the more deserving it is of your limited time.

Category	Assessment Questions	Score 0-10
Need	How 'real' is the customer's need? <small>(no need at all = 0; absolutely need our solution now = 10)</small>	
	How urgent is it? <small>(no urgency at all = 0; just thinking about it = 5; very urgent, they have a deadline or upcoming event = 10)</small>	
	How likely is it that they still might decide to do nothing? <small>(highly likely = 0; no chance, they will proceed = 10)</small>	
Solution	How well could our solution or offerings address their needs? <small>(not at all = 0; perfectly, we are the only choice = 10)</small>	
	How difficult will it be for us to do what we're being asked? <small>(maybe not possible = 0; some challenges but achievable = 5; easy, we've done this before = 10)</small>	
	How standard or non-standard will our solution be? <small>(considerable customisation required = 0; minimal customisation = 5; standard = 10)</small>	
Pricing/ Value	How good a deal is this likely to be in terms of gross profit for us? <small>(lose money = 0; break even = 5; greater than average = 10)</small>	
	What is their propensity to pay for quality and expertise? This is especially important if it requires us to put together a non-standard solution. <small>(they won't = 0; typical = 5; price is not a concern, they will buy on quality = 10)</small>	
Competition	How well do they know us at the present time? <small>(refused previous proposals = 0; have bought from us previously but no recent interactions = 5; one of their divisions buys from us but they are not major account = 10)</small>	
	How likely is it that they will never really buy from us and that they are just using us to get quotes or a better deal with their present supplier? <small>(highly likely = 0; not likely = 5; no chance, we are their only choice = 10)</small>	

TOTAL [/100]