

Qualifying System

It's important to be able to quickly qualify prospects and leads so that we can apply scarce resources and time to the highest potential opportunities. Therefore, you need to create some qualifying criteria.

On the next page is a model I've developed. Substitute your own criteria and ratings as appropriate. I've filled in the content to illustrate the usage. It's a great idea to run every prospective client through this quickly. (Just because you only have a few leads doesn't mean you should pursue them if they're not potentially valuable. You'd be better off spending the time on further marketing.)

Instructions:

- 1. List your ideal traits for a potential client.*
- 2. Rate those traits based on 10 as highest and 1 as lowest. You may have more than one 10 or any other number.*
- 3. Fill in the actual traits that your prospect possesses.*
- 4. Score your prospect's actual traits against each ideal, with a 10 being a perfect fit, and a 0 being a total mismatch.*
- 5. Multiply the rating times the score in each category.*
- 6. Add up the rated scores to get a total.*
- 7. Compare the total against the ideal total (all 10s in scoring) and come up with a percentage of the idea.*
- 8. Decide which percentage minimum is required for follow-up and with what priority and apply. I recommend nothing below 80%.*

Note: If you don't have enough information to complete the form, then do some further homework. It will be worth it.

Qualifying System and Template

Ideal Traits

• History of using consultants	7
• Within a day trip of my home	2
• Services or financial industries	6
• Minimum of 250 employees	8
• Financially strong/ stable	9
• Buyer easily identifiable	10

Rating

Ideal Traits

• History of using consultants	7
• Within a day trip of my home	2
• Services or financial industries	6
• Minimum of 250 employees	8
• Financially strong/ stable	9
• Buyer easily identifiable	10

Rating

Actual

Use constantly
Overnight trip
Mortgage lending
625 people
#3 the industry
VP operations

Ideal Traits

• History of using consultants	7
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Rating

Actual

Score

Use constantly	10
Overnight trip	0
Mortgage lending	10
625 people	7
#3 in industry	8
VP operations	8

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Rating

Actual

Score R/S

Use constantly	10	70
Overnight trip	0	0
Mortgage lending	10	60
625 people	7	56
#3 in industry	8	72
VP operations	8	80

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• History of using consultants	7
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Rating

Actual

Score R/S

Use constantly	10	70
Overnight trip	0	0
Mortgage lending	10	60
625 people	7	56
#3 in industry	8	72
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Total Rated Score:

338

Total Possible Score:

420

TRS %:

80%

In my example, the maximum R/S possible (all scores of 10 in every category) would be 420. The actual candidate scored 338, which is 80%, or a low "B."