



## List of Attributes for Qualifying Prospects

The following is a laundry list of possible attributes from which to qualify prospects. Use this list as a starting point from which to select attributes and assign numerical values. Then customize them to your needs.

### CUSTOMER RECEPTIVITY SCALE

Use these attributes for the Customer Receptivity scale. They describe how open a customer may be to taking your calls, hearing your sales pitch, or meeting you. When qualifying prospects select a number between the top and bottom of the range for the attribute.

ATTRIBUTE	COLD	WARM
<b>Info Request</b>	They haven't requested any info from you. <b>(0)</b>	They've requested info from your web site, at a tradeshow, etc. <b>(+1)</b>
<b>Permission</b>	No permission given. <b>(0)</b>	They've given you email permission to send them newsletters, articles, etc. <b>(+3)</b>
<b>Relationships</b>	Don't know anyone at prospect company. <b>(-2)</b>	You know one or more decision makers or influencers. And they like you. <b>(+3)</b>
<b>Hosted Attendance</b>	They don't attend contractor-sponsored events. <b>(0)</b>	They've attended an event you've hosted, i.e. tradeshow event, golf event, etc. <b>(+2)</b>
<b>Trade Associations</b>	They don't belong to trade associations. <b>(0)</b>	Prospect participates in trade associations you can join. <b>(+1)</b>
<b>Current Business</b>	You don't have any business with prospect at other locations. <b>(0)</b>	You've received contracts from this prospect at other locations within the last 1-2 years. <b>(+3)</b>
<b>Past Bids</b>	You've never submitted a bid to the prospect's company. <b>(-1)</b>	Prospect's company has asked you to bid within the last year. <b>(+1)</b>
<b>RFI Process</b> (Request for Information)	They don't use RFI's. <b>(0)</b>	Prospect's company has asked you to participate in an RFI process within the last year. <b>(+1)</b>
<b>Reverse Auctions</b>	Prospect has a reputation for using online reverse auctions. <b>(-3)</b>	Prospect does not use online reverse auctions. <b>(0)</b>

(Continued) List of Attributes for Qualifying Prospects

## CONTRACTOR INTEREST SCALE

Use these attributes for the Contractor Interest scale. They describe how much you want a particular type of prospect, or not. When qualifying prospects select a number between the top and bottom of the range for the attribute.

ATTRIBUTE	UGLY	BEAUTIFUL
<b>Contract Size</b>	Below your minimums <b>(-3)</b> in: ( ) dollars, or ( ) square feet, or ( ) Hours per Week, etc.	Exceeds your "A" Targets <b>(+3)</b> in: ( ) dollars, or ( ) square feet, or ( ) Hours per Week, etc.
<b>Price Sensitivity</b>	Well known low price buyer. <b>(-2)</b>	Reputation for premium price for premium service. <b>(+2)</b>
<b>Customer Reputation</b>	Known as difficult customer to work with. <b>(-2)</b>	Good reputation for integrity and collaboration with contractors. <b>(+1)</b>
<b>Loyalty</b>	Puts contracts out every year, regardless of service. <b>(-1)</b>	Known to work with contractors to avoid going out to bid. Helps incumbents. <b>(+1)</b>
<b>Contract Term</b>	1-year contracts only with mandatory annual bid. <b>(0)</b>	Uses multiple year contracts with extensions. <b>(+1)</b>
<b>Payable History</b>	Routinely pays in 60-120 days. <b>(-3)</b>	Pays in advance of service delivery. <b>(+4)</b>
<b>Safety</b>	Questionably safe work environment with high liability risk. <b>(-2)</b>	Prospect is fully committed to safety, which has high visibility and investment. Work environment has low liability risk. <b>(+1)</b>
<b>Operational Fit</b>	You haven't done this type of work before and it requires specialized skills, experience and/or certifications. <b>(-2)</b>	This work is your core strength. You have highly skilled and credentialed operations staff and great references. <b>(+1)</b>
<b>Geographic Fit</b>	You don't have any office/location within 2 hours drive. And the site doesn't support its own manager. <b>(-3)</b>	Location is within your established area and is easily serviced by existing offices or route personnel. <b>(+2)</b>



(Continued) List of Attributes for Qualifying Prospects

ATTRIBUTE	UGLY	BEAUTIFUL
<b>Vertical Market Fit</b>	You're not familiar with the industry your prospect is in. Their industry is shrinking, and is expected to go away. <b>(-2)</b>	Prospect's business is in a vertical market that you're great at. Their industry is expanding rapidly. <b>(+2)</b>
<b>Flagship Value</b>	Prospect has no visibility, or brand recognition. <b>(0)</b>	Prospect is an easily recognized Fortune 500 brand name that will greatly help you secure other work. <b>(+3)</b>
<b>Quality Orientation</b>	No quality focus. <b>(0)</b>	Prospect uses formal quality program and includes certification (Six Sigma, ISO, Lean Manufacturing, 5S, etc.) <b>(+1)</b>
<b>Green Orientation</b>	No commitment to Green. <b>(0)</b>	Prospect has gone publicly Green and has high visibility to its audiences. <b>(+1)</b>
<b>Small &amp; Disadvantaged Business Orientation</b>	Prospect is required to set aside work for MBEs/WBEs. Has high public profile. <b>(-1)</b>	No set asides or regulations. <b>(0)</b>
<b>Security Regulatory Requirements</b>	Prospect governed by regulatory programs: Transportation Workers Identification Cards (TWIC), Maritime Transportation Security Act, Chemical Facility Anti-Terrorism Standards (CFATS), etc. <b>(-2)</b>	No government regulatory programs (other than OSHA, EEOC, etc.) <b>(0)</b>
<b>Union - Non Union</b>	Yes and union is adversarial with contractors. <b>(-1)</b>	No union involvement. <b>(0)</b>
<b>Incumbent Position</b>	Incumbent has strong relationship with prospect and long history of proven delivery and innovation. <b>(-1)</b>	Prospect admits poor service from incumbent, and there's no love lost. Also, incumbent is distracted outside due to possible sale, acquisition, new ownership, etc. <b>(+3)</b>
<b>Past Bid Familiarity</b>	Never bid on this location or with the prospect's company before. <b>(0)</b>	Have bid this location, and with this prospect's company. <b>(+1)</b>



(Continued) List of Attributes for Qualifying Prospects

## About Service Performance

We help raise clients' revenue through industry-specific sales training, collateral materials, proposal and presentation upgrades. Our clients secure contracts more frequently and retain more of the accounts they already have.

- For more info qualifying prospects call Chris Arlen @ 206-780-2963, or email [carlen@serviceperformance.com](mailto:carlen@serviceperformance.com)
- More sales insights from our Revenue-IQ blog, visit: <http://www.serviceperformance.com/blog>
- More sales & marketing services, visit: <http://www.serviceperformance.com/services.php>
- Permission to reprint or distribute, email: [carlen@serviceperformance.com](mailto:carlen@serviceperformance.com).

© 2008 Service Performance.