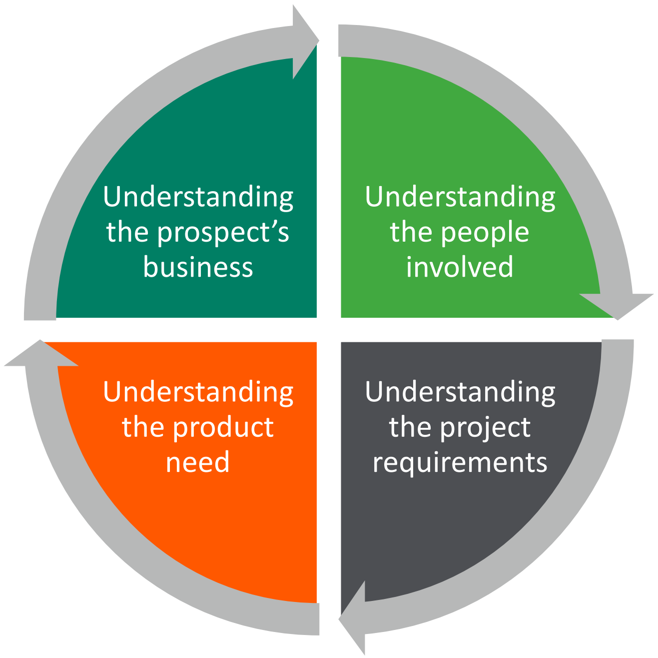
Sage CRM
Sales Qualification Guideline Questions

This document is designed to support telemarketing, pre-sales or salespeople successfully navigate the initial conversation(s) with prospects or leads. The objective is to convert these prospects or leads into opportunities (Qualified Sales Opportunities).

We have identified 4 basic dimensions to the qualification process during this first phase:



A qualification call should always begin with building an understanding of the prospect's business and the people who may be involved in the process. This will help understand the prospect's goals and help build the relationship, as well as providing visibility into the stakeholder group who will influence the deal (or are impacted by it).

Once topics 1 and 2 have been addressed, the qualification call will typically focus more on specifics i.e. understanding what in particular the product will address, and establishing boundaries for the project. Completing this part of the qualification process may take a second call.

The following table is the master-list of questions aligned to the four main topic areas. These are explained in more detail, with supporting notes and questions, on the subsequent pages.

N.B. The order of these questions may change depending on the conversation.

The Role of BANT

In many regions BANT criteria (Budget, Authority, Need, Time) must be met before lead is deemed worthy of exploration. The questions proposed in this document are flexible and open enough to allow additional BANT-type qualification as the conversation flows. The difference is that we do not propose a dedicated section or set of questions to BANT.

Key Questions	
Tell me about your business - what do you do, what drives success and what challenges do you face today?	Answers to Key Questions may also cover BANT criteria. Keep a note of this.
Notes:	
Have you ever implemented any IT before in your company? How did it go?	
Notes:	
Who are the key stakeholders/decision-makers, and what are their top priorities for this system? What does it need to do to show success?	
Notes:	

Do you have a timeline in mind in which you need to show results?	Answers to Key Questions may also cover BANT criteria. Keep a note of this.
Notes:	
Talk to me about your sales/marketing/service model – how does it work, do you have an established process, and how is this measured and managed today?	
Notes:	
What would you like your sales/marketing/service process or model to be in future, in order to take advantage of opportunities or meet challenges ahead?	
Notes:	

1 - Understanding the Prospect’s Business

Key Question	
Tell me about your business - what do you do, what drives success and what challenges do you face today?	
Your notes:	***Any BANT met?***
Supporting notes: Winning business means understanding a prospect’s business – in particular, how they ***make*** or ***save*** money or ***decrease risk.*** Gathering facts about a prospect’s circumstances allows us to link our proposition with their aims. The end goal is to prove quantifiable benefit greater than the software spend. *Supporting Questions:* • What is the purpose of your business? • What do you sell, to whom & how? • How is your company’s success measured? • How does this impact you & your colleagues? • Who are your competitors? How do they operate in your market? • What are the short term and long-term issues? • What do you want to achieve? What is your aim?	

1 - Understanding the Prospect’s Business

Key Question	
Have you ever implemented any IT before in your company? How did it go?	
Your notes:	***Any BANT met?***
Supporting notes: Understanding current systems illuminates a prospect’s approach to business & information technology. These can include level of IT spend, experience in procuring systems, typical user numbers & roles, in-house IT expertise, current systems footprint, current systems in the business and more. *Supporting Questions:* • Have you had challenges in the past with this type of system? • Can you describe what sort of challenges? • How ready are your staff for a new system? • Are you introducing any process change at the same time? • What do you have in place now? • What do you like about the system – what works well? • What are the key frustrations with the system people are using now? What impact is that having on the business?	

2 - Understanding the People Involved

Key Question	
Who are the key stakeholders/decision-makers, and what are their top priorities for this system? What does it need to do to show success?	
Your notes:	***Any BANT met?***
Supporting notes: Companies rarely have just one buyer – understanding each buyer & what they require of a solution is essential to matching needs. Be sure you build credibility & understand their needs in the same way you have worked with the main contact. Try to make direct contact with as many decision makers as possible. *Supporting Questions:* • What are their top 3 priorities for this system? • What specifically will convince them that you have chosen the right solution? • Who will sponsor and sign off the project? • Who else is involved? Project Team? Steering Committee? Defined group of end users? • Is there any Group or Head Office involvement? Any third parties? Consultants? What exactly is their role?	

3 - Understanding the Project Requirement

Key Question	
Have we a timeline in mind in which you need to deliver results? How important is this project, and how urgent?	
Your notes:	***Any BANT met?***

Supporting notes:

Specifying a date by which value MUST be delivered can allow us to work backwards towards start dates and also narrow the scope of phase 1. This also helps assess the <u>real need</u>. Where a prospect is driven by external challenges (say, a change in regulation), then the commitment to buy something is high. Similarly, a new initiative from a managing director has a large impetus whereas an IT admin person just “checking the market” may be less. Understanding who needs a system & when will help you influence the buying timetable.

Supporting Questions:

Timescale and Scope of Project

- When do you need the solution in place? What is your timetable and key steps for getting to that point?
- Who wants it in by this time? Why? How many people will need access to the system (initially and long term)?

How real is this project?

- What key business issues are you facing that have prompted this initiative?
- What, if anything, might de-rail this project? (Other system or business projects)
- How high a priority is it? What will happen if you do nothing? Is there a compelling reason or date driving this project?

Budget and Sign-off

- Is this a budgeted project? How much have you budgeted?
- What is your funding approval process? How do software purchases get signed off?
- Does it at least have board visibility? Do you need to prepare a business case internally and has this been done?

4 – Understanding the Product Need

Key Question	
Talk to me about your **current** sales/marketing/service model **–** how does it work? Do you have an established process, and how is this measured and managed today? What would you like your **future** sales/marketing/service model to be? How do we take advantage of opportunities or meet challenges ahead?	
Your notes:	***Any BANT met?***
Supporting notes: This question should make specific links between business needs and the product features that will meet those needs. Focusing on *current* process improvement ensures the prospect's concerns are being met in the short-term. This builds confidence. Enquiring about the *future* direction of the business can open the door to other features or aspects of CRM that the prospect may not have considered. These build ambitions.	

Supporting Questions:

Sales

- What do you sell and what is your target market? Who are your top 5 customers? How do you grade them?
- Describe your business model? Selling direct or through other channels?
- How is the sales organisation structured? How are salespeople targeted and incentivised?
- What processes do you need to see improved? Why?
- How do you report revenues and forecasts?

Marketing

- What is the main function of Marketing in this organisation?
- How do you do your marketing? Mailers, Seminars, etc.? What works best?
- How do you measure that? What could be improved? Can you easily profile and target the people you need to?
- How do you manage lead generation and track follow-up?

Service

- What is the main function of Customer Service - do you have a call centre? Complaints dept? Field service engineers? Helpdesk?
- How is the service operation structured?
- What processes do you need to see improved? Why?
- Is customer satisfaction and loyalty where it should be? Why?