



SCOTSMAN

Sales Qualification Checklist

Salesperson

Date

Customer/Prospect:	1	2	3	4	5	Total
<input type="checkbox"/> S - SITUATION: Is It A Genuine Requirement? <ul style="list-style-type: none"> Are you convinced that we are not being used as a "patsy"? Is there a SPECIFICATION for this project? 						
<input type="checkbox"/> C – COMPETITION <ul style="list-style-type: none"> Do we know who they are? Does the prospect display a particular bias to xxxxxx? Do Hypertec have some unique/overwhelming advantage? Are we comparing product like for like ? 						
<input type="checkbox"/> O - BASIS OF DECISION <ul style="list-style-type: none"> Do we understand the basis on which they will decide? Do we know the decision-making process 						
<input type="checkbox"/> T – TIMESCALES <ul style="list-style-type: none"> Do we understand the timescales and why they have been set? Are the plans realistic for us? For the Customer? 						
<input type="checkbox"/> S - SOLUTION – OUR'S <ul style="list-style-type: none"> Do we have a viable solution? Do we have the resources to cover it? Do we have any uniques? How well have we differentiated our proposal? 						
<input type="checkbox"/> M – MONEY <ul style="list-style-type: none"> Do you know the budget? Will we have to discount? Can we meet the required terms? Is the budget realistic? 						
<input type="checkbox"/> A - AUTHORITY <ul style="list-style-type: none"> Are we talking to the decision maker? 						
<input type="checkbox"/> N – NEED <ul style="list-style-type: none"> Do we fully understand the customer's objectives for this project? Are there further needs we could identify? 						
TOTAL						

Remember, Where There Are Low Scores, You Need To Check The Points Without Delay!

Out of 40 ?