

First Call Qualification form to determine if **BizCustomer** is a good fit? (Y/N)
(Prospect)

Date: 3 / 01 / 07

Purpose is to consistently qualify and indentify opportunities that are a good fit and to determine the appropriate solution required to close the opportunity.

Upfront Agreement

Open with a greeting:

Good morning **John**, thank you for granting me an appointment. I promise that I will not go over my twenty-minute limit without your permission. I know that you are very busy and I don't want to waste your time or mine.

Establish the terms of the upfront agreement:

Well **John** I know that in businesses like yours, **accurate and timely information** (fill in the blank with a relevant statement) often marks the difference between profit and loss. The purpose of this meeting is not to sell anything. But what I would really like to accomplish right now is to see if our product/service, knowledge, and experience is a good fit for your needs.

Term-1: During the call as we ask and answer each other's questions, we may decide that there isn't a good fit between what we have to offer and what you need. In that case we may decide that it doesn't make sense to spend anymore time talking. If we reach that point, would you be comfortable in telling me that? ...wait for answer...Very good.

Term-2: Now if, on the other hand we decide that we can provide the benefits you are looking for, then I would like your agreement that we would setup a time when we could meet to discuss things further with you...is that fair? ...wait for answer...Very good.

Thirty-second commercial about your company/product/service:

GeneriCO Software combines the key functionality of customer relationship management (CRM) and business management into one software solution. GeneriCO empowers businesses to grow by enhancing the value of customer relationships and increasing customer loyalty by delivering data visibility across the organization. GeneriCO provides a 360-degree view of prospect and customer relationships, providing instant access to all relevant data from sales, to service delivery, to billing and customer service.

For twenty-two years, GeneriCO Software has enabled small to mid-size businesses and associations such to run and grow their entire operation with a single application to create more profitable, agile, and sustainable operations.

GENERICO provides enterprise solutions in the areas of: Customer Relationship & Business Operations Management

Are we a good fit?	What are you hoping we can do for you?	<input type="checkbox"/> CRM <input type="checkbox"/> SFA <input type="checkbox"/> Forecasting <input type="checkbox"/> Customer Service <input type="checkbox"/> Customer Retention	<input type="checkbox"/> Recruiting New Members <input type="checkbox"/> Time Billing <input type="checkbox"/> Business Intelligence <input type="checkbox"/> Event Management <input type="checkbox"/> Business Process Automation	<input type="checkbox"/> Increase Revenue <input type="checkbox"/> Analytics <input type="checkbox"/> Manage Contacts <input type="checkbox"/> Automation
	Start Building a Profile for a Solution			

Research this information before the call...check web site	Contact Info (name, title, role, phone, email):						
	<ul style="list-style-type: none"> Individual Name, Title: Company: Address: City, St, Zip: Phone: Email: 		<p>John Smith, VP of Sales & Marketing BizCustomer, Inc. 1313 Main Street US City, ST, 12345 800-123-4567 x100 Johnsmith@BizCustomer.com</p>				
	Company Info:						
<ul style="list-style-type: none"> Type of Business, Industry Years in business Annual Revenue Number of employees How do they make money? 		<p>Management Consulting Services 10 years \$30M 15 Billable Hours, Monthly Retainers</p>					
Possible Product/Service Offering		OnPremise – CRM Single User	OnPremise – CRM Multi-Users	OnDemand – CRM Single User	OnDemand – CRM Multi-Users	OnDemand ERP	

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Consultation Questions

Think of yourself as a business doctor (consultant). Ask diagnostic questions that will uncover symptoms for proper treatment and for cure for their pain.

The Hook and Lead In:				
<i>(Common problem 1) Now John do you find that you suffer from spending too much time manually processing or searching for information that is critical to running your business? (Common problem 2) Or, do you have a problem with not following up or managing relationships in a timely manner (leads, customers, partners)? ...wait for their real answer; this should start to uncover their real pain...</i>				
1. Please explain your typical business process? (Help me understand your business process)	Receive request → Initial Consultation → Develop Proposal → Presentation → Complete Agreement → Assign Project → Initiate Engagement → Perform Assessment → Develop Report/Findings → Submit Report → Client Accepts → Submit Invoice → Receive Payment → Follow Up → Repeat			
2. Are you currently using an automated system to run your business?	Using MS Office...Excel & Word			
3. How many different systems are you using? What are they? Note: For example, they may be using QB for accounting, Outlook for contact management, maybe ACT! for prospecting and any number of applications for customer service.	NA			
4. How are you tracking your clients and prospects?	Excel & Note Pads...We track many contact types. Including Contractors, Clients, Partners, Network Contacts, Service Providers (financial advisors, accountants, attorneys, etc.). Government Contacts.			
5. How do you track service calls or customer support requests?	Spreadsheets and Paper			
6. Do you dispatch calls to techs?	Yes, we assign projects to consultants			
7. Do you bill for your time?	Yes, we have an hourly rate of \$600/hr or Fixed daily/monthly rates \$2,000/day or \$20,000/month			
8. What are some of the shortcomings in your current systems?	Manual, Decentralized, too many mistakes, miscalculations			
9. What type of functionality are you looking for in a system?	(1) Client Management Systems, (2) Client Portal and/or Service Provider Portal, (3) Knowledge Base accessible to clients and service providers			
Decision Maker – Decision Making Process				
10. When purchasing a system, what are the most important issues – functionality, price customer service, etc.?	Experience, ease of use, Functionality, scalability, price, service.			
11. What is your decision making process? (Committee, manager)	Partner review and consensus.			
12. Who will sign the agreement?	One of the 4 partners			
13. What's your time line to have something in place? Why? Note: This question is a good lead into the funding questions	< 1-Month	2-Months	3-Months	4-Months +
14. Have you allocated funds for a system?	Partner Davis, End User consultant Johnson, Admin Susie, Technical Support Michael			
15. If so, how much is budgeted? Note: These questions need to be handled in a sensitive manner and are very important; if they are don't have a budget, it's an uphill battle and could be a waste of time.	What if I said it will cost \$200/person, per month , is that a problem? (Example: Five Person License \$12,000/year / 12 = \$1,000 / 5 = \$200)			
Avoid being shopped – before doing anything else (i.e. sending a proposal), Ask... What other individuals and/or departments will this decision affect? I would like to interview them first, before I generate a proposal.	Partner Davis, End User consultant Johnson, Admin Susie, Technical Support Michael			
NEXT STEP:				
I understand... again, my purpose today was not to sell anything. I wanted to get a good understanding of your needs. Earlier we agreed that if we thought that we might be a good fit, we would schedule another meeting for a more in depth discussion and demonstration to explore your options. Do you agree that we are a good fit? Would you like to schedule that now?				