

Sales Qualification Matrix - Evaluation of a Prospective Client

Identify the five most important characteristics of your ideal client. Apply the same criteria to all prospects. Assign a numeric score to each prospect based on their strength within that area; where 1 is the weakest and 5 the strongest. Evaluate and take action on an opportunity based on the qualifications of prospect as compared to the ideal.

Prospective Client: _____

Qualification Criteria		Score
1.		
2.		
3.		
4.		
5.		
Total		

Total Score	Action
1 – 10	Disregard - not a good opportunity
11 – 15	Caution - low potential & probability
16 – 20	Proceed - continue to qualify & advance
20 – 25	Full steam ahead!



The Sales Qualification Matrix is deceptively simple in appearance. Within its simplicity, you can focus on evaluating each opportunity against five criteria.

The key to successfully implementing the Sales Qualification Matrix is to have thoughtfully created the five criteria you will evaluate your opportunities against.

Typically, these are the most important characteristics of your ideal client. Comparing an opportunity against what is ideal for your business can be quite revealing.

Over the course of my career I have found this to be a very helpful tool. The Sales Qualification Matrix takes the 'emotionalism' out of evaluating an opportunity.

I imagine that you don't have a shortage of opportunities in your business. Determining which are the best opportunities to spend your time on may be challenging.

Another component of the [Sales Qualification Matrix](#) is the Action Box at the bottom.

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This provides a good rule-of-thumb on how to proceed. There are however, always exceptions. Sometimes there is an opportunity that you must pursue for strategic reasons and yet when it's evaluated via the Sales Qualification Matrix, it might receive a score in the "Caution" range.

The Sales Qualification Matrix is useful in this case because it makes you aware of any shortcomings when pursuing the opportunity. It also enables you to decide how much time and resources to invest, especially when you are pursuing multiple opportunities at the same time.

I hope you find the [Sales Qualification Matrix](#) useful. If you have any questions about it or would like to discuss how it can be used to your best advantage, please let me know. [Contact me here.](#)

I am happy to answer any questions you have.

Elizabeth

