



BY JIM ALEXANDER, ED.D.

Sales Quality: Getting Better Sales Faster

I'm always amazed at the time, effort, and organizational frenzy that often accompany sales efforts that should never have been attempted in the first place. How often has your organization's scarce resources been misspent trying to get projects that, upon analysis, were never within the realm of possibility? Or worse yet, how often have you won projects that would never allow you to profitably meet client expectations?

This column focuses on how to create a "Qualifying Checklist," a sales performance improvement lever that you immediately can apply to get better sales faster. For example, *Figure 1* is the Qualifying Checklist that I personally use in exploring new business opportunities. It contains the 10 factors that over the years I've found have the most impact on my procuring good business. I score each factor and use the total as an overall indicator of

success. The higher the overall score, the better the chance of both getting the sale and delivering a quality project. If the overall score is low (say 30 or less) or I've scored one or two factors very low, this tells

me I should not put any more effort into this venture and instead invest my selling resources on higher probability opportunities.

Here are the steps required for you to develop and use your own

Qualifying Checklist

SUCCESS FACTORS	RATING				
	low				high
1. Importance to the Account	1	2	3	4	5
2. Business Fit	1	2	3	4	5
3. Personal Fit	1	2	3	4	5
4. My Reputation with the Account	1	2	3	4	5
5. Consulting Attitude	1	2	3	4	5
6. Competitive Position	1	2	3	4	5
7. Access to the Decision Maker	1	2	3	4	5
8. Funding	1	2	3	4	5
9. Importance to Me	1	2	3	4	5
10. Timing	1	2	3	4	5

(Source: Adapted from *The Knowledge-Based Organization*, Irwin Professional Publishing).

Qualifying Checklist. Invest a few hours and involve a few key folks (say a team of five to seven, including those responsible for selling, consulting, and finance) to:

1 Analyze the last five or six “good” sales (fast sells with good profit margins and happy clients) and talk about why these were successful. Look for root causes. Next, think of and talk through the last few big non-sales (lots of time and money spent, but no business) and discuss why these efforts were unsuccessful. It takes a little digging, but some common elements will be revealed.

2 Use the above information to determine the five to 10 success factors that are most important to your organization in procuring good business. Clearly define each factor and write down examples (you will have to communicate this to the rest of the organization later). Make sure that there is agreement on meanings and consensus on the factors selected. Finally, put your factors into a checklist format that

allows quantification.

3 Test your Checklist by scoring a few of the past sales and non-sales discussed in Step One. You will find a big difference in the scores of these two groups. Modify your factors and the definitions until you are satisfied with their appropriateness.

4 Apply the Checklist to your current prospects. This will open some eyes. Ask the people on your team who are involved in selling to take five minutes (that’s all it takes) to score two or three of their current prospects. It is not uncommon for the team to realize that 25 percent or more of the projects being pursued are bad prospects—virtually a zero chance of procuring profitable business.

5 Systematize use of the Checklist. In two- to four-hour sessions, introduce it to all your people involved in selling. Explain its use and have everyone use the Checklist to qualify existing prospects. This is a great way to help the selling team discover what quality sell-

ing is all about and to help them focus resources on the best bets. It also will make you cognizant of the reality of your existing forecast.

6 Use the Checklist as a management tool. At this point, everyone in the organization has a common vocabulary. Use the key success factors as a feedback guide to understand and manage selling resources. The more you use it, the better you will become at forecasting and filling your sales funnel with high-potential business.

That’s all there is to it. Invest a little time, follow the above steps, and I’d be very surprised if you don’t see immediate improvements in your selling performance. ▼

Jim Alexander is president of Alexander Consulting, LLC, a management consultancy that creates and implements strategies for professional services organizations. He may be contacted at 239-283-7400 or visit www.alexanderconsultingsbiz.com.

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