

# CREATING AN ANALYSIS SHEET

## Purpose:

When trying to determine whether the people you are meeting with are “suspects” or “prospects”, it’s all about the questioning strategy. Your time is valuable, so you don’t want to waste your time with people who aren’t your best candidates to become a new customer. Most importantly, your questioning strategy can help you better understand their position, their needs and ultimately determine if you can even help them. By creating a sheet that you use to qualify your potential customers you will:

- Have a “cheat sheet” to ask all the pertinent questions and in an appropriate order.
- Have a systematic and consistent way to qualify your prospects, which could lead to documented market research
- Shorten your sales cycle, since you’ll be asking a comprehensive amount of questions early on in the relationship.
- Shows your prospect you’re organized and serious about understanding their needs.

It’s important to have many blank copies of your personal analysis sheet handy, by your telephone and in your planner or briefcase. Use the same one all the time Remember, you will not go through this sheet as if you were interrogating them or conducting a survey. It should be a natural-flowing discussion. In most cases, prospects will think positively that you have such a tool.

In my opinion, “needs” come first. You have to understand what their current and ideal situations and to better determine IF you can even help them. Use open-ended questions (What, How, Why...). Secondly and before you waste too much time, you’ll want to better understand who makes the ultimate decision and who has strong influence. Next, and assuming you can help them and you understand how the decision-making process works, you’ll want to make sure you’re on the same page with the timing of when they will be needing and buying your product or service. You may be thinking next week and they are thinking next year! Lastly, once you’ve developed rapport, respect and credibility, you’ll need to confirm what they are willing to invest in your product and service. Understand that the topic of budget may already come up when you talk about decision-making and timing.

**Now, it’s your turn to design your personal analysis sheet>>>>>>**



### Needs:

### **4-Part Questioning**

*“Tell me how...”; “Walk me through...”; “Explain what happens when...”*

*“How do you go about...?”; “What’s most important to you?” “What criteria..”*

*“What would be the consequences of...?”; “What are your expectations?”*

### Decision-making:

*“Do you need to bounce this off someone else in the company?”*

*“Explain your internal decision-making processes for a service such as this.”*

*“What’s your specific role in deciding on my services for your company?”*

### Timing:

*“Is it feasible to begin start the service next month?”*

*“Where do you stand with your current contract obligations?”*

*“Why don’t we plan on a September roll out— is that reasonable?”*

*“From my standpoint, we could reasonably get this started next week, how about on your end?”*

### Budgetary:

*“What dollar range are you looking to invest?”*

*“Is there a budgeted line item for XYZ products for next year?”*

*Are you considering a \$500, \$2,000 or \$10,000 investment?” (you fill in reasonable \$ amount choices for your industry)*

# Needs Analysis

Date: \_\_\_\_\_

Contact: \_\_\_\_\_

Phone number: \_\_\_\_\_

Company: \_\_\_\_\_

Email: \_\_\_\_\_

Location: \_\_\_\_\_

Website: \_\_\_\_\_

## NEEDS QUESTIONS:

1)

2)

3)

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## DECISION-MAKING QUESTIONS:

1)

2)

3)

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## TIMING QUESTIONS:

1)

2)

3)

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## BUDGET QUESTIONS:

1)

2)

3)

## NOTES:

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## NEXT STEPS: