

How to Effectively Qualify

Not qualifying or ineffective qualifying is one of the major causes of frustration and ultimate failure in sales. We qualify to evaluate if a prospective client is worth pursuing now or in the near future or possibly not at all. Not every prospective client will meet our qualifying criteria.

Before contacting the prospective client find out as much information as you can about them, their company and problems, preferably critical problems that you may be able to solve.

To effectively qualify you will need to cover 4 areas: (TEMP)

1. Time

This is the timeframe for the expected decision. Is the decision a top priority and therefore the sale confirmed immediately or if not what would be the timeframe for the decision?

2. Essential

Do they need your product or service? If so is it a want or a critical need to solve a problem? Where would you look for this information and to whom would you need to speak to?

3. Money

Does the prospective client know how much it will cost to solve their problem? Has money been allocated, will it be allocated or will money be found from another source?

4. Power

Who are the people involved in the decision process? Who can give the financial approval?

Apart from qualifying the prospective client by phone and or in person there are other avenues available to get information. These are asking a third party such as a colleague and through media research. Pre-qualify as much as possible to gain information so you will be able to strategically position yourself, your company, products and services to their greatest advantage.

Clients, including long-term clients, need to be re-qualified when:

- 🕒 Your company has released a new product or service
- 🕒 Your client's company has restructured.

Examples of qualifying questions are:

Time –

“What process does your company go through and what would be the timeframe?”

“If the proposed changes were implemented what outcomes would you expect in 12 months?”

“How is your business going...how is it different from 2 years ago?”

“How long does it usually take to get approval of this type?”

Essential –

“What do we need to do so everyone views this recommendation as the preferred option?”

“What is holding you back from achieving your goals?”

“If you don’t solve this problem what kind of difficulties will you face as you move forward?”

“If you were to achieve this outcome what will it mean for the company...your career?”

Money –

“What funds have been set aside?”

“What has been the cost to date of the problem?”

“How much would you expect to pay to solve this problem?”

“From what other source could funds be found?”

Power -

“What is the best way to contact your business partner to set up a meeting?”

“Who else apart from yourself is involved in the decision process?”

“How do you see the decision process going?”

“What actions do you need to take to approve this proposal?”

If you want your prospective client or client to provide more detailed information you can do so by asking *“Could you expand on that...how would that work...when you said (quote their statement) what did you mean?”*

Effective qualification is a must have skill in sales and can help to establish clear lines of understanding and expectations. It can also save you time, frustration and build a successful selling career.

Remember TEMP – Time, Essential, Money and Power.

For more information on this subject or if you would like to discuss a current sales problem then please contact Kurt Newman direct on +61 412 252 236 or email sales@salesconsultants.com.au.



Kurt’s works with clients in a range of areas including: sales strategy, sales coaching, mentoring, group structured sales training and sales management development. He is the author of 21 Timeless Insights for Sales Success.

As a sales person he successfully sold products and services in 4 major market segments: new product sales, consultative sales, relationship sales and retail. During his selling career he created sales records for three companies in two industries and won many sales awards for outstanding performance.



