

QUALIFYING TIPS

convergo

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Key Fundamentals Of A Successful Prospecting Strategy

- Set daily/weekly activity goals
- Multiple touches
- Block time
- Hone your skills

Objectives of a qualifying call:

- Determine if the opportunity is worth pursuing
- Close for Discovery Call

Why a client would agree to a Discovery Call?

- If they have a problem that you can help with
- If they feel you are credible to help

TIPS

Ensure you plan your meeting for the attendees and their priorities:

Business Owner

Business Value

High-level issues for each department

IT Manager

Security

Control

Supporting users

Deployment

Managing the environment

Finance Manager

ROI

Cost Control

Total Solution value

Compliance

Security

Operations Manager

Productivity

Training

Streamlining workflows

Questioning Funnel

Open Questions

- Example: *How is business?*
- Start with “What” or “How”
- Very open-ended gets a lot of information, potentially not focused or helpful

Open Leading Questions

- Example: *What are your plans to secure your network?*
- Start with “What” or “How”
- Direct the conversation to a specific area, ideally to your strengths
- Plan your Qualify calls with open leading questions

Probing Questions

- The questions after the answer that get you deeper
- Difficult to prepare for these, but very important
- Key to asking good probing questions is to truly care, listen, and be in the moment.
- Don’t think ahead. Be present.

Close Questions

- Example: *So you are looking for ways to secure your network?*
- Confirm understanding
- Emphasize/summarize points



BANT Qualifying Strategy

Budget ▪ Authority ▪ Needs ▪ Timeline

Budget:

Ensure there is budget for your solution

Look for ways to extend the value of the solution by bringing in other applications or devices.

Authority:

Ensure you understand this person has the authority to make a decision and that you understand everyone that might weigh in to the decision.

Needs:

There is indeed a need you can help with. Ideally, this points to your strengths or broadens the scope of your solution.

Timeline:

Ensure that this is an opportunity that is worth your time now.

Qualify Call Agenda

- Introduce company and relevant experience
- Explore challenges aligned with the reason you set up the meeting
- Qualify. Explore all:
  - Budget
  - Need
  - Close for Discovery
  - Authority/Process
  - Timeline

How to prep for a Qualify meeting:

- Fill out a call planner
- Send the agenda
- Send the client content that will tee them up for the meeting:
    - Case Studies/Success Stories
    - Blogs that align with this stage