**Qualification Best Practice**

The goal of the first call to a suspect company should always be to qualify them as being worthy of subsequent prospecting calls.   To use prospecting time in the most optimal way, we should never call into a company that is not a qualified candidate.  The sooner we determine if a company is qualified, or not, the better.

The pursuit strategy is based on the premise that during the first pursuit step, it is worth making up to three phone calls, to three different people, to ask our qualifying question.

 Let's review **'who to call'** and **'how to navigate'** and **'what to say.'**  And, then, **'how to report'** your findings as either 1) qualified, 2) not qualified or 3) could not qualify.

**Who to Call:**

**Gatekeeper**:  The gatekeeper is the most logical starting point because they are often the person who answers the phone.  They will often know the answer to the qualifying question.  They will often be reluctant to answer your qualifying question.

Note: The gatekeeper is such a good starting point, that if the number is a direct dial to the Decision Maker, you should click '0' to see if you can find a gatekeeper.

**Outsider**:  An outsider would be someone in the sales department, or perhaps, someone in the accounting department.  You should tweak your qualifying 'what to say' as appropriate, if necessary.

**Insider**:  An insider is the IT manager, works in IT, or is responsible for IT.  These folks may not be the person with whom you would ever want an appointment.

**How to Navigate:**

You should chat with up to three contacts in order to qualify before you mark the account as 'Could not qualify.'   The gatekeeper, the outsider and the insider.

**First Chat**:  If the Dial goes to the Gatekeeper, use the 'what to say' with them.

If they do not qualify the account, ask for the DMs voicemail and leave the message in your Best Practice.  If you actually reach the DM, use the DM script.

Note: The gatekeeper may pass you directly to the IT department without comment.  If so, engage the IT person.  If IT does not answer, hang up, call the gatekeeper and politely say 'Thanks for putting me through, they were not there, could you help me?' Ask the question again.

**Second Chat**.  Your choice to either

1. Call back to the Gatekeeper, thank them for putting you through to voicemail and ask to be transferred to the Insider.  You can leave a voicemail with them also.
2. If you can find a phone tree, select an Outsider option.  Or, ask the Gatekeeper to transfer you.

**Third Chat**.  If your first choice does not work, try the other one.


**What to say**

Use the sample scripts below as is, or as a template, to create your specific 'What to say' scripting


**How to report your findings**

There are only three results of this approach.  You learn they are qualified, or not qualified; or you cannot qualify them at all.

In the field called 'Number of PCs' you should do the following: (in a CRM or Contact Science)

1. Enter the number of PCs you were able to confirm.  (You may also have a Company Type field to indicate what you learned.)
2. If you tried, but could not confirm, enter '00' which indicates you did this Qualify on First Call Approach but were not successful. (You may also have a Company Type field to indicate what you learned.)

   Note: if you decide to try this Qualification Approach again, and fail again, change the Number of PCs to '000' to indicate a second try and a second fail.


If you use Contact Science for prospecting, we recommend that you add the 'Number of PCs' field to the Call Block report.  This will enable you to see how well the process is being followed.  Other fields useful to add to the Call Block report are 'Current Support' and 'Company Type.'

Learn more managing the prospecting process using Contact Science from this short video.

# What to say (including DM Script and Voicemail)

This scripting uses a 'Webinar'  approach, but you can also use an 'Event' or 'Marketing Material' approach that you prefer.

**Gatekeeper Script:**

Hey [GK NAME], this is [USER NAME] with [Your Company.]  Are you familiar with my company?

 I was calling because we'll be conducting a series of Webinars on Technology Investment this year.   We provide local executives insight into how to get the most from their budgets for computer software and support .   I am calling to confirm the information we have about your company, so we invite the right folks to the right events.   My records show that [Decision Maker] would be a good person to invite and that your company has XX folks using computers every to get their job done.   Is that still correct?

Could I also get [DM] email address?

Note:

1.  Make sure you confirm the current DM and not settle for the name of the IT guy.  If you can get the IT guys name, fine;  but typically not useful.

2.  If they don't seem to know the answer to # of PCs, give them two ranges.  Would you say less than 10? More than 40?

**Insider Script:**

Hey [NAME], [GK NAME] sent me over to you. This is [USER NAME] with [Your Company] By chance, are you familiar with us?

(We/Then you know) we provide local executives insight into how to get the most from their budgets for computer software and support .

 I am calling to confirm the information we have about your company, so we invite the right folks to the right events.   My records show that you and [Decision Maker] would be a good folks to invite?  Plus, your company has XX folks using computers every to get their job done.

Is that still accurate?

**Outsider Script:**

Hey [NAME if Known], this is [USER NAME] with [Your Company].  Are you familiar with us?

 I have just been assigned to your account and was calling because we'll be hosting a series of webinars. luncheon in your area later on this year.  It's on technology and security – I show (name of DM) would be the best person to invite.  Does that sound right to you?

My notes also show that you have between 10 to 40 computers, is that still right?

Perfect, thanks, could I also get their email address so we can email the invite?


**DM Script:**

Hey [NAME], I didn't expect to get you. I was just talking to [GK NAME]

We provide local executives insight into how to get the most from their budgets for computer software and support .   I was calling to confirm the information we have about your company, so we invite the right folks to the right events.

My records show that you would be a good person to invite, thus my call.  Also, we show that your company has XX folks using computers every to get their job done.  Is that still accurate?

Could you give me your email address so I can send you some more information about our company and invite you to a Webinar, or two?

Thanks so much!


**DM Voicemail:**

Hey [DM NAME], my name is [USER NAME] with [Your Company]

We periodically hold webinars into how companies in the area are getting the most from their computer software and support budgets.   I am calling to confirm the information we have about your company, so we invite the right folks to the right events.

If you would, please give me a quick return call.  I believe that you, and perhaps others in your company, will find these webinars of value. My number is [USER NUMBER].  That's [USER NAME] at [USER NUMBER].


**Insider VM:**

Hey [DM NAME], My name is [USER NAME] with [Your Company].  [GK NAME] sent me to you because she wasn't sure who should be invited to a webinar series we will conduct this year.   Would you take a minute to call me back? My number is [USER NUMBER].  That's [USER NAME] at [USER NUMBER].