

A Dozen Strategic Prospect Screening Questions

Once we get the opportunity to get in front of a prospect it's important to make the most of the meeting time and ask the questions that will prove critical to getting off on the right foot. Asking the right questions can save a lot of time and energy when putting together the right presentation, or deciding to pass on making a presentation at all.

I've developed a dozen questions that I feel really get to the heart of the matter, quickly. Asking the right questions impresses the prospect too.

The single most important benefit of using this list is that the prospect gets to do the talking. I've seen, and been a part of too many sales presentations (interviews) where the agency does all the talking and never learns about the prospect. Use these questions, let the prospect talk, and I guarantee you, you'll be more successful at selling the prospects you want to sell.

1. What role do you expect your new agency to fill? (Research, planning, creative, media, etc.)
2. Are you working with an agency now? In the past? Why are you changing?
3. What are your company's general short and long range marketing objectives and what role will the agency play?
4. What do you want most from your new agency?
5. What type of presentation do you expect? (Time length, location, split costs, etc.) Are we compensated for making the presentation?
6. How do you compensate your present agency? Are you satisfied with the current arrangement? If not, what do you feel is the optimal arrangement?
7. Who from your company will attend our presentation?
8. Who from your will approve our presentation . . . or how will the decision be made?
9. Has anyone in your agency selection team worked for an agency?
10. What will be deciding factor on presentation?
11. What is your biggest marketing challenge?
12. How do you measure the effectiveness of your communications program?

Numbers eleven and twelve have been intentionally placed last on the list. The reason for this is the last impression you want to create is that you are a strategic, rather than tactical, thinker. You should want them to know you are approaching their situation from a marketing perspective, that's why these questions deal with marketing challenges and measurement of effectiveness of the work.

After you return to the agency, confirm the prospect's answers in a letter. By doing this, it keeps the dialog between the agency and the company open. By confirming the responses to your questions, you eliminate any misunderstandings and consequential false starts on the presentation.