

Chapter 15 |  
**Client Prioritization Tool**



**Instructions**

Take some time to review the clients and prospects on whom you are spending time to see if you are 'choosing' like an Other-Centered seller—choosing those you can serve best. Review and answer these questions to help better understand if there really is a business opportunity, can you win it, and if you do, will it be worth it. After scoring several clients and prospects, you'll be able to see which ones score higher and represent the best use of your limited time so you can adjust and choose accordingly.

**Is There an Opportunity?**

			SCORE
Compelling Event	Yes <input type="checkbox"/> (3) Is there a compelling event that is motivating your client to invest now?	Potentially <input type="checkbox"/> (1)	No <input type="checkbox"/> (0)
Funding/Budget	Yes <input type="checkbox"/> (3) Does the client have a budget approved (or the financial resources) for investing in your recommendation?	Potentially <input type="checkbox"/> (1)	No <input type="checkbox"/> (0)
Solution Fit	Yes <input type="checkbox"/> (3) Does your current solution align with the client's perceived needs?	Potentially <input type="checkbox"/> (1)	No <input type="checkbox"/> (0)
Decision-Maker Access	Yes <input type="checkbox"/> (3) Related to this opportunity, are you confident that investing in your solution aligns with a top priority on the decision-maker's whiteboard?	Potentially <input type="checkbox"/> (1)	No <input type="checkbox"/> (0)
			SUBTOTAL

**Can You Win?**

			SCORE
Competitor Loyalty	Weak <input type="checkbox"/> (3) How would the decision makers describe their relationship with or commitment with their current provider (or competitor)?	Neutral <input type="checkbox"/> (1)	Strong <input type="checkbox"/> (0)
Political Alignment	Weak <input type="checkbox"/> (3) How well is your solution aligned with the decision makers' and influencers' decision drivers?		Strong <input type="checkbox"/> (0)
Your Relationship	Weak <input type="checkbox"/> (3) How would the decision makers describe their relationship with you, your organization, and their commitment to your solution?	Neutral <input type="checkbox"/> (1)	Strong <input type="checkbox"/> (0)
Solution Value	Weak <input type="checkbox"/> (3) Does the decision-making team value the unique solution you offer?		Strong <input type="checkbox"/> (0)
			SUBTOTAL

continued

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Is It Worth Winning?				
Growth Opportunity	>\$ _____ <input type="checkbox"/> (3)	\$ _____ to _____ <input type="checkbox"/> (1)	<\$ _____ <input type="checkbox"/> (0)	SCORE
What is the potential revenue with this account?				
Current Opportunity	>\$ _____ <input type="checkbox"/> (3)	\$ _____ to _____ <input type="checkbox"/> (1)	<\$ _____ <input type="checkbox"/> (0)	
What is the size of the current opportunity?				
Resources Required	Low <input type="checkbox"/> (3)			High <input type="checkbox"/> (0)
What internal and external resources are required to win and serve this account?				
Profitable	High <input type="checkbox"/> (3)			Low <input type="checkbox"/> (0)
How profitable is this opportunity/account?				
				SUBTOTAL
				TOTAL