



Framework: The Qualifying Conversation

The **example** questions are provided for consideration only. This is not a script but a list of possible questions you might choose from, in addition to others that you might arrive at on your own.

Context

What is the client's situation?

Why did you reach out to us?

Tell me about your (company, situation, etc.)

Why us?

How did you hear about us?

DFS (Desired Future State)

What is the client's desired future state?

Imagine we are having this conversation three years from today. You are really happy. What's happened to make you so happy?

What's your personal mandate within this vision?

What obstacles are in the way of this vision?

What makes you optimistic about achieving this vision?

What is the condition you are trying to improve?

What is the outcome you'd like to achieve?

DM (Decision Makers)

Who are the decision makers and what is their decision making process?

Tell me about the decision making process your organization uses to hire a firm like ours.

In addition to yourself, who else needs to be involved in the decision to hire a firm like ours?

Does (specific person or department, e.g. procurement) need to be involved?

Does anybody need to approve your decision once you make it?



Framework: The Qualifying Conversation (continued)

TF (Timeframe)

When do you need to make a decision and why?

When do you need to have a solution in place? (Why?)

When do you need to get started? (Why?)

What happens if you don't make your deadline?

\$ (Budget)

Are funds allocated, and if so, how much?

Have you allocated funds for this project? (If yes, how much?)

Is there a budget line item for this? (If yes, how much?)

Do you have a budget for this already or were you looking for help in setting it?

Drive The Next Step

Is there a fit, and if so what is the next step?

Do you need to:

Help set a timeframe?

Help allocate funds?

Get to missing decision makers?

Move to a value conversation?

Set up another conversation with your team members and appropriate client-side personnel?

Sell a diagnostic?

Decline because of poor fit?



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PROSPECT NAME

COMPANY

Context

WHAT IS THE CLIENT'S SITUATION?

DFS

WHAT IS THE CLIENT'S DESIRED FUTURE STATE?
IS THERE A FIT BETWEEN THE CLIENT'S DFS AND OUR EXPERTISE?

DM

WHO ARE THE DECISION MAKERS AND WHAT IS THEIR PROCESS?

TF

WHEN DO THEY NEED TO MAKE A DECISION AND WHY?

\$

ARE FUNDS ALLOCATED, AND IF SO, HOW MUCH?

Drive The Next Step

IS THERE A FIT, AND IF SO, WHAT IS THE NEXT STEP?