

SIGNS YOUR PROSPECTS ARE SOBS

Name of prospect:

Date:

Prospect contact info:

Lead source of prospect:

1. Scope of prospect business/project:

2. How much income does this client/ project promise to bring in immediately: \$

3. List the easiest, fastest parts of this work:

4. List the more challenging, more costly or frustrating part of this client work:

5. List the aspects of this job/ client you have already started complaining to your colleagues, friends, significant others, family members:

6. How much you need to invest in this client to make the project a success including supplies, getting more support, tools and equipment for you / client:

7. Describe the payment arrangement with the client:

8. They haggled on price Yes / No

9. They already wasted your time or tried to get free advice / work Yes / No

10. They gave material you asked for in a fast, courteous manner Yes / No

11. You were both on time for you meetings Yes / No

12. You are both excited to work together Yes / No

13. You never had problems with this lead source who referred the client Yes / No

14. List any other red flags, strong emotions, or unsettling thoughts about this prospect, company, lead source or previous interaction with all parties involved:

15. Describe your ideal client situation with this prospect only stating things in the positive: