

# Prospect Evaluation Survey

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Prospect Name \_\_\_\_\_

Prospect Title and Company \_\_\_\_\_

1. Does the prospect fit your company's image of an ideal customer?  
*Compare the prospect to the demographics of your best customers*
  
2. Does the prospect have the means (budget) to purchase your products or services? *While it may be uncomfortable, you need to ask this question upfront*
  
3. Does the prospect have the authority to purchase your products or services? *Ask questions about timeline and the prospect's decision process*
  
4. Is the prospect a referral? *Referrals tend to be qualified leads, especially if the source, such as a current client, understands your organization and offerings*

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Converting prospects into qualified leads can be more art than science. In general, yes answers to the above questions can help you determine qualified leads. That said, you never know when a prospect may become a referrer who knows or is related to one of your future best customers or clients.

Contact Reciprocate today for additional ideas to help market your organization.

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