**Qualifying your prospects to get the best clients – Working Smarter, not Harder**

Does this scenario sound familiar to you?

You receive a call for what sounds like a great new project. It is a complete backyard renovation with a stone patio, pergola, fire pit and screen plantings. You jump in your car and drive 45 minutes to meet the new prospect. You then spend two hours walking through the project with the prospect exchanging design ideas and potential budgets. You are about to wrap things up and head back to the office to start designing he project when they mention their timeline…. The project needs to be completed in 6 weeks for their daughter’s wedding!! Your lead time is out ten weeks and you have no flexibility in the schedule. You have no choice but to politely turn down the project.

As you drive back to the office, you are kicking yourself for wasting 3 ½ hours of your time at a busy time of the year. You will never get these hours back. How could this have been averted?

**Pre-screen and Qualify your prospects!!**

Your time is very valuable – especially in the spring and fall. You need to spend what time you have wisely. You must find ways to work smarter, not harder. This starts with implementing a solid, well-structured pre-screening and qualifying program. The program should be documented and trained so several people in your organization can do the screening and pre-qualifying of the prospects that call.

Building the program has a number of facets to it:

**Pre-screening** – This is the first step where you make sure that the prospect’s project aligns with the work you do.   
Today, pre-screening can be done via websites, blogs, and social media and by way of an incoming phone call. Social media content promoting your blogs and your company website will help a prospect select your company over another but can also educate a prospect before they even complete a “contact us” form. Through blogs and content, a contractor can share the nuances of design fees, timelines, budgets, minimum size projects, etc. Key words and social media targeting can help direct and target the right audience. For example, the prospect may need a large tree removed from their property. Your website can clearly show that do not do arborist work, so the prospect can move on to other companies that do provide this service.

**Qualifying the prospect** – Now that you have determined that this is a solid prospect, you need to then qualify the prospect. This is where you talk in depth with the prospect to get a better understanding of the scope of work and services needed to be sure this prospect is a good fit for your company. This function is generally performed by the salesperson or designer. Given the right parameters, a receptionist or someone in your office with a good phone presence can perform this function as well. If after going through the pre-screening process and you are unsure whether this is a true prospect, a good strategy is to invite the prospect to come into your office and meet with you. In your office, you have the ability to show them photos or videos of completed projects as well as potential hardscape or plant material selections. If a prospect is willing to visit your office, they are more than likely going to be a serious prospect.

**Create a script** – To be sure that you are carefully qualifying the prospects that contact you, it is important to follow a script, so you cover all the critical questions. In the heat of the season, it is easy to hurry through the qualifying process and move on to the next tasks. Having a script will ensure you ask all the key qualifying questions to get the information you need to determine if this prospect is right for you and your company. It will also allow a number of people in your organization to perform this function. This will go a long way in assuring you that you will be meeting with a great prospect.

**Create a list of Qualifiers-** This is the key part of the pre-screening and qualifying process. The qualifiers will make sure that you are not chasing after prospects that you will never work with. Qualifiers should include:

1. **Timing** – What is the client’s timeline or deadline? Does it align with your schedule and backlog?
2. **Minimum project size** – You should know what the minimum project size you do that is profitable. What is your cost to send out a three-man crew in one of your trucks fully equipped? Is it $3000? $5000? $10,000? You cannot afford to run out to perform some very small projects. You can’t be everything to everybody.
3. **Location** – is this project in your normal trading area? If it is well beyond, you may want to turn it down unless it is a direct referral from one of your great existing clients.
4. **Design Fees** – These fees are great qualifiers. If a prospect is unwilling to pay for design fees, it is highly likely that they are just out “shopping” for the lowest price.
5. **Consultation fees** – You initial meeting may be complimentary, but make sure the prospect knows that there is a one-hour limit. Beyond an hour, your hourly consultation fee should kick in. This will help prevent Mrs. Jones form walking you though her garden for three hours to pick your brain and get design ideas.

By creating and documenting a solid pre-screening and qualifying process, your chances of finding a great new client go up exponentially along with your sales. The amount of wasted time in your day, will be drastically reduced as well.

For more information on Qualifying your prospects, or If you would like a copy of a pre-screening script, please contact me at judson@harvestlandscapeconsuting.com.