



New Client Questionnaire

We are frequently asked how to get started and what information we will need to prepare the training and scripting package. In order for us to define the approach, we will need the following information. You can answer the questions below and fax to us at 620-717-7671 or scan/email.

Contact Information:

Contact Name(s) _____

Company Name _____

Address _____

Web address _____ Phone _____

E-mail address _____ Fax _____

Goals of the program – Please describe what results you are seeking (leads, appointments, market research, other) and what you would like to achieve with your sales program? Are you seeking in person appointments, phone appointments, or leads?

Contact list – If you will be providing the contact list, it should be in XLS or CSV format. If we provide the contact list, it can be based upon the following factors:

Please advise of the geographical areas based upon zip code, city, metro, county, or state that we should be contacting.

2147 Dobbin Road NW - Lebo KS 66856

www.richworldwide.com

888-443-5247



Please list contact titles you would normally target when making calls.

Please advise of the number of employees for your prospect list. You may have multiple selections from the following list: 0-9, 10-19, 20-49, 50-99, 100 to 249, 250 to 499, 500 to 999, and above 1000.

We can target all businesses or specific types of businesses based upon SIC codes. Please describe the types of businesses you want us to pursue.

Who will be conducting the appointments or responding to leads?



If you are seeking appointments, what type of appointments are you seeking? Phone appointments, in person appointments, or web based?

Gathering more information with qualifying and probing questions:

Before we generate a lead or schedule an appointment, we will attempt to gather information to qualify your prospect. What questions are important and what information should we gather?

Other information and sales materials:

Please advise of the materials that you can provide for us in preparing your training and scripting program. For example, some clients provide recent sales letters, brochures, website URL, etc. Please e-mail those items to us or fax those items to 815-927-0110.

Please advise of the materials that we will have available to send to your prospects. Do you have PDFs available? If so, please attach.



Please provide 3-5 sentences to introduce your products or services?

How would you describe your company?

Please tell us about your company history. How long have you been in business and explain how your company compares to your competitors.



Please provide any additional comments that might be applicable to development of your program.

We will use the above information to prepare the training and scripting package. We will provide this document to you via e-mail for your review and feedback.