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|  | Questions roadmap |

This document is intended to give you a “head start” in creating your questions roadmap for calls and meetings with current and prospective clients. Pick and choose from the questions listed and add any tried-and-tested personal favorites that are specific to the client’s industry. Then format everything into a sequential questions roadmap.

Curiosity questions

* What led you to seek/take this meeting today?
* What are your expectations for today’s meeting? What do you hope to get out of it/learn from it/leave with today?

Vision questions

* What are the key strategic initiatives for your department/business/organization this year?
* What is the time frame for accomplishing these initiatives?
* How will accomplishing these initiatives affect the department/business/organization?
* What are you expected to contribute to the accomplishment of these initiatives?
* What role might an outside partner play in helping you accomplish these initiatives?

Current situation questions

* What is the primary mission of your department/business/organization?
* What are the critical success factors for you, your team and your organization?
* How is your organization measured and evaluated?
* What might be done to ensure or accelerate the accomplishment of your goals?
* What financial investment is required/available to accomplish these goals?
* What are the top three operational or business challenges you face on a daily/weekly basis?
* If you could change anything in the current environment, what would it be?
* Who/what puts the most demand on your department/business/organization? Explain.
* What grade would you give your current situation?

Impact questions

* What are your most pressing issues/challenges?
* What is the impact if the organization doesn’t solve these issues/challenges?
* How are these issue/challenges affecting sales? Profitability? Scheduling? Quality? Production?
* What do you think these issues/challenges are costing you?
* Let’s assume you decide not to address these issues/challenges immediately. What will that cost you this year?
* If you don’t fix the issues/challenges at hand, what is the potential impact on your business? Can you afford to take that risk?

Justification questions

* How does the organization justify this type of investment?
* How does the organization measure the success/failure of the investment after the fact?
* What contribution might a firm make to your justification process?

Competition questions

* Who is your current firm? What criteria did you base their selection on? Why are you considering leaving them?
* What alternatives is the organization considering?
* What are the key solution criteria that the successful firm must deliver?

Qualification questions

* What are the “must have” capabilities of the winning firm?
* What are the key evaluation criteria that will be used to select the winning firm?
* What lack of capability would automatically exclude a firm?
* How might the winning firm impact the overall goals of the company?

Decision-making questions

* What are the key steps in your decision-making process?
* What role do you personally play in the decision-making process?
* Who else is typically involved in these decisions and what role do they play?
* Who ultimately approves the investment and executes the agreement?
* At what point will you involve this individual?
* What is your timeframe for making a decision?

Our firm questions

* What do you know about our firm?
* What type of current client might be appropriate for you to call/visit?
* When would a presentation or demonstration of our capabilities be appropriate?
* Who should be invited to that presentation/demonstration meeting?
* What are the most valued characteristics of vendors that you consider as true partners?

Commitment questions

* What are the appropriate next steps for us?
* Are you ready to move forward with this?