DISCLAIMER: Remember, it’s all just data. Read everything but use your common sense when deciding what information and ideas you apply to your business.

CUSTOMER SCORING CHECKLIST  
“Those who focus on less usually accomplish more.”

Profile Label (Ex: “B2B Technology Salespeople”): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Customer**  **#1** | **Customer**  **#** | **…** | **SCORE** |
| **WHO ARE THEY?** |  |  |  |  |
| Are they in a narrowly defined industry? |  |  |  |  |
|  |  |  |  |  |
| Behaviors: |  |  |  |  |
| Company Needs/Goals: |  |  |  |  |
| Personal Needs/Goals: |  |  |  |  |
| Scoring: |  |  |  |  |
| **WHAT ARE THEIR ROLES AND TITLES?** |  |  |  |  |
| In today’s day and age, there is usually one or more people that influence purchasing decisions at a company. |  |  |  |  |
| Decision Maker (makes the call): |  |  |  |  |
| Economic Buyer (writes the check): |  |  |  |  |
| Influencers (influence the decision in a good way): |  |  |  |  |
| Sabatogers (influence the decision in a not so good way): |  |  |  |  |
| End Users (are the ones engaging with the product or service): |  |  |  |  |
| Scoring: |  |  |  |  |
| **HOW MANY ARE THERE?** |  |  |  |  |
| How many of your profile target are in your market (collect a sample of data)? |  |  |  |  |
| **DO THEY FIT YOUR PRODUCT/IDEA?** |  |  |  |  |
| These questions require you to know the constraints of your product and service. |  |  |  |  |
| Do your current features match their needs? |  |  |  |  |
| Do the current constraints match their needs? |  |  |  |  |
| How hard would it be to adapt your product/service to their needs? |  |  |  |  |
| How long would it take to adapt your product/service to their needs? |  |  |  |  |
| How well does your pricing meet their constraints? |  |  |  |  |
| **HOW HARD IS IT TO SELL TO THEM?** |  |  |  |  |
| What marketing channels will get their attention? |  |  |  |  |
| What is the cost to acquire each customer? |  |  |  |  |
| How long will it take to acquire each customer? |  |  |  |  |
| Will they be a recurring customer? |  |  |  |  |
| What is their lifetime customer value? |  |  |  |  |
| **ARE THEY EARLY ADOPTERS?** |  |  |  |  |
| These are five early adopter questions taken from |  |  |  |  |
| Do they have a problem that you can solve? |  |  |  |  |
| Do they understand they have a problem? |  |  |  |  |
| Are they actively searching for a solution? |  |  |  |  |
| Is the problem painful enough that they have hacked together a solution? |  |  |  |  |
| Do the have the fund to quickly purchase your solution? |  |  |  |  |
| How difficult is it to acquire them as customers? |  |  |  |  |
| **HOW TO RANK THEM?** |  |  |  |  |
|  |  |  |  |  |