Customer Selection Checklist:

Customer’s Purchasing Power: What is customer’s annual revenue/net worth?

Payment: Prompt payment history?

Growth: Potential for customer to grow?

Referrals: Actual referrals and potential for future referrals.

Timing Work: When does customer need project completed? Are they patient?

Expectations: Does the customer have reasonable expectations?

Listening Power: Is the customer willing to listen and take advice?

Company Age: Time in business?

Personality: Are they enjoyable to work with?

Technical Competency: Are they technically competent?

Capital: Are they well capitalized?

Innovation: How much of their business is making money from services from services or products introduced in the last five years.

Gut: What is their gut score (A, B, C, D, F).

Loyalty: Customer loyalty.

Vulnerability: How much are the clients willing to open up. Is there a personal connection?