# Sales & Marketing One-Page Uninterrupted Checklist

**If Prospect Responds to Us - Become “Marketing Qualified Lead”**

*Did you open with two magic questions (what is their criteria for success, why)? Yes No*

*Do we know how they heard about us? Yes No*

*Do they fit our customer profile? Yes No*

*Do we understand their process and hot buttons (where they are getting stuck)? Yes No*

*Do we understand who they are targeting? Yes No*

*Did you spend 75% listening and 25% asking questions? Yes No*

*Did you update the CRM (Follow-up Task, Lifecycle, Contact Info, Notes)? Yes No*

*Did you complete follow up task in CRM? Yes No*

**If Lead Fits Our Profile, Understand Their Success - Become “Sales Qualified Lead”**

*Did you share story and value prop of ScoutSheet? Yes No*

*Did you demo ScoutSheet? Yes No*

*Did you follow demo rules (qualified, focus on their issue, don’t stray, no ifs)? Yes No*

*Did you instill a sense of urgency (price increase)? Yes No*

*Did you update the CRM (Follow-up Task, Lifecycle, Demo Notes)? Yes No*

*Did you complete follow up task in CRM? Yes No*

**If Lead Fits Our Profile, Has Sense of Urgency- Become “Opportunity”**

*Did you identify and handle their concerns and objections (feel, felt, found)? Yes No*

*Did you provide them guarantees (that we can deliver)? Yes No*

*Did you go for the close (trial close, just ask for it, pre-contract)? Yes No*

*Did you take them to signup page or send them link to signup page? Yes No*

*Did you update the CRM (Follow-up Task, Lifecycle, Demo Notes)? Yes No*

*Did you complete follow up task in CRM? Yes No*

**If Lead Starts Paying - Become “Customer”**

*Did you take time to thank them the next day? Yes No*

*Did you handoff to customer success? Yes No*

***FINAL SCORE \_\_\_\_\_/22***