

LEAD QUALIFYING SHEET

#	Customer Profiling - (Name)		Free text field	Weightage	Max. Scope	
1	What is the source of Lead?	Cold Call	1	Dealer	4	5
		Marketing Department	2			
		Referral	3			
		Dealer	4			
		Existing User	5			
2	Who are we selling the project through?	System Integrators	4	End User	5	5
		End User	5			
		PEB	1			
		Consultancy	2			
		Dealer	3			
3	Have you worked with customer before?	Yes	4	Yes	4	4
		No	0			
4	What is the management style of the customer?	Proprietary	1	Public Listed	3	6
		Directors Private Limited	2			
		Public Listed	3			
		Corporate MNC	4			
		Corporate Indian	5			
		Family Owned	6			
5	Do we know the decision markers / Influencers ?	Yes	4	No	0	4
		No	0			
6	Do we have exiting relationship with decision makers ?	Yes	4	Yes	4	4
		No	0			
7	How is our relationship with decision makers?	No relationship	1	Talking terms	3	5
		Hostile	2			
		Talking terms	3			
		Friendly	4			
		Personal	5			
8	Who is educating the customer?	Consultant	1	Internal Projects Team	3	4
		Architect	2			
		Internal Projects Team	3			
		Internal Service Team	4			
9	What is the financial health / Credit worthiness of the customer?	Sound Financials and Growing	6	Sound Financial and Steady	5	4
		Sound Financial and Steady	5			
		Sound Financial and Shrinking	4			
		Unstable Financial	3			
		Bad Paymaster	2			
		SEPL Bad Debt History	1			
Service Profile						
1	Does Customer engage OEM's for PM activity?	Yes	4	No	0	4
		No	0			
2	Does he have an inhouse maintenance team?	Yes	4	Yes	4	4
		No	0			
3	Does SEPL have a past service engagement with customer ?	Yes	4	Yes	4	4
		No	0			
4	What is the likelihood of service conversion after warranty	Low	1	Moderate	1	2
		Moderate	1			
		High	2			
Project Profile						
1	Is it a greenfield of brownfield project	Greenfield	1	Brownfield	2	2
		Brownfield	2			
2	Size of the Project	Small < 25 lacs	1	Large > 75 lacs	3	3
		Medium < 75 lacs	2			
		Large > 75 lacs	3			

LEAD QUALIFYING SHEET

#	Customer Profiling - (Name)	Free text field	Weightage	Max. Scope												
3	What is the total project investment	0		0												
4	Scope of the Project	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Crane</td><td>1</td></tr> <tr><td>Conveyor</td><td>0</td></tr> <tr><td>Fixture</td><td>0</td></tr> <tr><td>Hoist</td><td>1</td></tr> <tr><td>Dongsan Rail</td><td>0</td></tr> <tr><td>LR Rail</td><td>1</td></tr> </table>	Crane	1	Conveyor	0	Fixture	0	Hoist	1	Dongsan Rail	0	LR Rail	1	Hoist 1	1
Crane	1															
Conveyor	0															
Fixture	0															
Hoist	1															
Dongsan Rail	0															
LR Rail	1															
5	Has the project budget been sanctioned / layout approved	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Yes</td><td>4</td></tr> <tr><td>No</td><td>0</td></tr> </table>	Yes	4	No	0	No 0	4								
Yes	4															
No	0															
6	What is the project timeline	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>< 3 months</td><td>4</td></tr> <tr><td>< 6 months</td><td>3</td></tr> <tr><td>< 1 year</td><td>2</td></tr> <tr><td>> 1 year</td><td>1</td></tr> </table>	< 3 months	4	< 6 months	3	< 1 year	2	> 1 year	1	< 3 months 4	4				
< 3 months	4															
< 6 months	3															
< 1 year	2															
> 1 year	1															
7	What is project location	1		1												
8	Is it within 500 km range of our office	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Yes</td><td>4</td></tr> <tr><td>No</td><td>0</td></tr> </table>	Yes	4	No	0	No 0	4								
Yes	4															
No	0															
9	What Vertical are we selling to?	0		0												
10	Have we worked in this vertical before?	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Yes</td><td>4</td></tr> <tr><td>No</td><td>0</td></tr> </table>	Yes	4	No	0	No 0	4								
Yes	4															
No	0															
11	Do we have domain understanding of this vertical?	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Yes</td><td>4</td></tr> <tr><td>No</td><td>0</td></tr> </table>	Yes	4	No	0	No 0	4								
Yes	4															
No	0															
Competition Profile																
1	Who is the incumbent supplier	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Demag</td><td>6</td></tr> <tr><td>Kone</td><td>5</td></tr> <tr><td>Electromech - Abus</td><td>4</td></tr> <tr><td>Street</td><td>3</td></tr> <tr><td>GH</td><td>2</td></tr> <tr><td>Local</td><td>1</td></tr> </table>	Demag	6	Kone	5	Electromech - Abus	4	Street	3	GH	2	Local	1	Local 1	6
Demag	6															
Kone	5															
Electromech - Abus	4															
Street	3															
GH	2															
Local	1															
2	Is customer aware of SEPL / Stahl brand	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Yes</td><td>4</td></tr> <tr><td>No</td><td>0</td></tr> </table>	Yes	4	No	0	No 0	4								
Yes	4															
No	0															
3	How is the customer's experience with incumbent supplier	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Preferred Supplier</td><td>1</td></tr> <tr><td>At Par with SEPL</td><td>2</td></tr> <tr><td>No longer preferred</td><td>3</td></tr> <tr><td>Blacklisted</td><td>4</td></tr> </table>	Preferred Supplier	1	At Par with SEPL	2	No longer preferred	3	Blacklisted	4	Preferred Supplier 1	4				
Preferred Supplier	1															
At Par with SEPL	2															
No longer preferred	3															
Blacklisted	4															
4	Has the competition started working on this project?	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Yes</td><td>4</td></tr> <tr><td>No</td><td>0</td></tr> </table>	Yes	4	No	0	Yes 4	4								
Yes	4															
No	0															
TOTAL SCORE			56	100												
RESULT			FAILED													