

ACME Corporation

QUALITY GUIDELINES

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Due Diligence Checklist

A checklist that helps you keep focused on your sales pipeline and tasks is an important part of a successful sales plan. Use these steps to create a Due Diligence Checklist appropriate to your company's sales process.

Overview

The Due Diligence Checklist ensures that important sales criteria are reviewed, analyzed, and accepted in chronological order.

Develop Prospect

Developing prospects includes the thorough investigation of a company or individual to assess their potential as a client.

Identify prospect

- ☐ You identify potential clients by using such sources as the newspaper, referrals, and research firms.
- ☐ Potential clients identify you through such sources as direct mail, advertising, and referral.

Contact prospect

- ☐ You contact a potential client by phone or in person.
- ☐ A potential client contacts you by phone, e-mail, or mail.
- ☐ Acquire basic account and contact information, including such information as annual sales, branches, and corporate size, as needed.
- ☐ Perform high-level prequalification of prospect by determining such criteria as fiscal stability or strategic value.

Qualify Opportunity

Review

- ☐ Review the viability of the opportunity by defining the client's need for your product, the scope of and objectives for engaging this client, and your company's ability to accomplish the scope and objectives.

Prepare and Present Solution

Define proposal of work

- ☐ Clarify and confirm details and budget with client by defining the timeframe, scope of effort, and the resources and product that the client requires.
- ☐ Define resources, including people, materials, locations, and distribution center.
- ☐ Present proposal to the client.