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Five questions to ask prospective clients

Date: October 18th, 2010
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Category: consulting
Tags: Client, Sales Tools, Outsourcing, Smb/Sme, Sales, It Operations, Business Operations, Outsourcing & Subcontracting

You've made contact with a potential client who might be interested in your services, and now you're ready to sit down and get details on what the prospect thinks they need. Here are five key questions that I have learned need to be addressed at the beginning of any potential consulting engagement.

1: Is there a budget in place for this project?

It's critical to ask this question early in client meetings. I've wasted too much time with potential clients who've called me in to discuss "championing" projects for them, only to find out that they have yet to get any cooperation from their CFO or necessary superior. I met with one prospect three times, and I ended with nothing to show for it. So, I've changed my tune, and I ask this question close to the beginning of every meeting with a potential client. You don't have to know in that first meeting how much the client can spend, but it is necessary to know that they can spend something.

2: What is the timeframe for completing this project?

If the client has already made promises to executives that the project will be completed by a specific date, you need to know.

I once led an effort to create an interactive website for a pharmacy. The client didn't tell me at the beginning of the project (and I failed to find out) that there was a drop-dead date for the task — and that date was as unmovable as the Rock of Gibraltar. To top it off, the client forgot to tell me that the drug database they were using was from a third-party who had originally hoped to create the interactive site. Needless to say, it took my best negotiating skills to get the third-party to cooperate with my team. Fortunately, the site was completed on time and was used extensively for 10 years. This incident taught me a valuable lesson, and I'm more careful about several of the questions I ask from the start, including the client's specific timeframe.

3: What is the single biggest problem you're facing that has led to us sitting here?

There's always one big need that the customer is aware of that has caused them to seek your services. There are also usually more than one "elephant in the room" type situations that you have to dig for and find out about. You need to ask the right questions to find the customer-perceived problem, and then you should ask more questions to see if that problem is really only a symptom of the real problem or problems that actually need to be addressed.

If you address only the customer-perceived problem, you'll make them happy for the short term; if you dig and find the real problem, you will win them over for the longer term.

4: What feedback are you getting from your end users?

This could be the end users of the current process that you will be working on or the end users of the potential new process you'll be implementing.

If the customer has come to you without first discussing the situation with their end users, the job of soliciting feedback will fall to you, which will affect your estimate. With no advanced warning, you may be basically cold calling end users, and if a new process affects or eliminates their jobs, then you may have a mutiny on your hands. It's very helpful to know what you're walking in to before you start a project.

5: Have you discussed the problem in detail with all in -house SMEs?

You need to make sure that this project wasn't dreamed up in the head of the client sponsor without any consideration to their in-house experts, who may be able to shed light on the issue or may have their own potential solution to the problem. You'll be working with the SMEs to come up with additional requirements, and the last thing you want is to be coming in and immediately stepping on toes — that can lead to push back, dead ends, and an overall major lack of cooperation.

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