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Classification of prospective clients by cooperation potential

If a marketing service works well in a company even if there is an advertising budget, a few dozen or a few dozen, and in some segments, several hundreds of potential customers may be added to the company's portfolio every day.

How to classify potential customers? How to determine their ability to make a deal, how to determine their commercial potential?

Why does a marketer have the potential of a client?

Let's first understand why do we need to determine the potential of the client? There are many reasons and reasons for knowing the potential of a client, here are some of them:

Whether to report about it to the chief or whether it is possible to earn on the client?

Whether to put it in CRM or how to classify customers in CRM?

What if the customer is not ready to deal right now?

What kind of information to send to the client by e-mail: immediately price list or until marketing-KIT?

What are "ABC-analysis" and "BANT criteria"?

In fact, there has long been a technology that allows assigning a status to each potential client. You should start with the fact that all potential customers should be ranked by ABC analysis and divided into groups, each of which should start working a little differently than with customers of the other group, depending on how ready they are for the deal.

The BANT criteria (Budget "budget", Authority "authority", Need "need" and Timeframe "time frame") are four assessment criteria that allow you to navigate the client environment in determining the potential of the client.

BANT is a fairly convenient universal formula that was marketed by IBM specialists several decades ago.

Criteria for determining the potential of the client (I will only contrast once again: this is mine and for the specific case - you have other clients and other criteria):

Criteria of client potential (BANT-criteria)

Indicator Criterion A B C

Need

Need

A potential client clearly articulates and captures the need that your products and services can satisfy. The client calls:

volume of demand;

kind of satisfying product;

leads analogues of competitors and explains his choice;

decided or understood ways to solve related problems, made a selection of related suppliers and intermediaries

indicates the existence of an approved project, a contract for the work to be carried out by him and other, which confirms the need.

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Authority

Authority

The contact person confirms the authority to negotiate the procurement:

is there a power of attorney to negotiate

whether there is a status, position, sufficient and implying powers necessary to make a decision;

whether it is a manager or a member of the purchasing team;

does it have any levers of influence on the decision-making process and what specifically.

3

Budget

Budget

Does a potential client have a "procurement budget" and what does he mean by "budget"?

the client already has an approved budget for the purchase of products and services,

has the ability to find the necessary financial resources by lending

does he try to formulate with you the financial requirements for the purchase of relevant products, services

whether it has guarantees or open financing (state financing) as part of a single project financing, in which it is only part of the work and expenses.

3

Timeframe time

A potential client calls a clear time frame:

has already determined the time frame for making a purchase decision;

is in the process of active research options;

knows the timing of the entire project, to which he is - only a part of the work.

Does the project implementation timeframe depend on it specifically? If not, does he know who the timeframes depend on?

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Thus, according to the results of the negotiations, answering a series of simple questions from 4 categories, for each definite positive answer the client receives a point. The number of points in each category from the maximum possible determines the overall rating from "A" to "C". Thus, using the simplest ABC analysis, we can evaluate both the overall prospects of the client and the very expediency of interaction with the client. If you show knowledge of the subject, market segment and fantasy, it is easy to expand the list of questions, the answers to which will allow you to assign a particular status according to ABC analysis.

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