

The PQ Worksheet

CORE NEED: The main motivation behind the purchase

Ultimate desired outcome from making a purchase. This is the big picture component of what will make the customer purchase. By identifying this you can frame smaller issues in a way that is favorable to this core need. EXAMPLE QUESTION: "Ignoring the details of the deal, what is your big picture goal here?"

The Nuts and Bolts of the Deal

DEAL LOGISTICS

What, When, How Many, Where, Etc.

Obviously these questions need to be asked, but they are not sufficient alone.

DECISION LOGISTICS

Who? Who will influence the decision and in what ways? Is there a buying team?

What Process? How and via what time schedule will the decision be made?

COMPETITORS

What Options are they considering?

Other companies or solutions? Do Nothing?
What solution is currently the most preferred?

OBSTACLES

Are there factors that should be identified upfront that have a high potential to derail a deal?

EXAMPLE QUESTION: "Do we face any major obstacles to getting a deal done?"

CRITERIA ISSUES: How the customer defines the appropriate solution

Decisions will be made based on which potential vendor scores best on the key issues for this customer, thus your first step is to understand those issues fully.

Product Criteria:

What product factors are key for this buyer? How do they rank them? Be patient and thorough here. Probe fully until you understand the issue and then rephrase it to ensure and confirm understanding.

Service/Relationship Criteria:

Clearly define what "great service" means to this customer. Don't assume everyone defines it the same way. Remember that service can mean service delivered by your company (e.g. delivery or technical support) and it can mean service delivered by you directly (e.g. frequency of calls or problem resolution). Try the question: "How can we provide you with the best service you have ever experienced?" It's goofy, but it works.

Price / Cost Criteria:

What are their cost expectations? Has a budget been set? What is it? What do they expect to come standard with that price? Don't be shy here.