



Prospecting Reality Check

Evaluate your prospecting effectiveness by responding to the following statements. Mark the option that best describes you, and total your score. Be as honest as possible.

1 = Never

2 = Sometimes

3 = Always

Statement	Score		
	1	2	3
1. I place importance on continuous traditional and virtual outbound prospecting activities.	1	2	3
2. I spend time building target lists and profiles using online tools and resources.	1	2	3
3. I spend time doing disciplined research on targeted segments and prospects before starting an outreach strategy.	1	2	3
4. I actively use social media, including LinkedIn, to research, target, and connect with my ideal prospects.	1	2	3
5. I monitor social media for prospect mentions of my company, my product/service, or a hashtag that aligns with my company's value proposition.	1	2	3
6. I invest time in and place value on improving my positioning in the marketplace by creating and/or sharing email content, blogs, videos, and posts to social media to existing clients and prospects.	1	2	3
7. I interact with marketing to develop ways to work together to develop new business.	1	2	3
8. I work to have a well-diversified mix of both large and small prospects (instead of large accounts only).	1	2	3
9. I organize and track virtual and traditional prospecting campaigns.	1	2	3
10. I consistently mine for new business inside my key accounts.	1	2	3
11. I always ask for referrals and testimonials from existing clients.	1	2	3
12. I maximize email and phone interactions with a concise and well-crafted message tailored to the prospect/client.	1	2	3

Statement	Score		
	1	2	3
13. I engage in scheduled, outbound prospecting activities (proactive) vs. waiting for inbound leads/phone calls (reactive).	1	2	3
14. I use short, online surveys to understand and connect with clients/prospects.	1	2	3
15. When possible, I work to gain an understanding of the formal and informal decision-making process inside the prospect's organization before any sales interaction (phone/email).	1	2	3
16. I rely on a mix of prospecting methods to increase my success rather than using only one method.	1	2	3
17. I know the characteristics of a qualified opportunity.	1	2	3
18. I only spend time with qualified prospects.	1	2	3
Total Score			

Score Results

If your total score is between 44-54, you are well-equipped at finding new business. Congratulations! There is always room for improvement, so focus your attention on any areas that you didn't select a strong "yes" response.

If you find that your total score is between 27-43, you lack some of the skills or initiatives that are necessary for successful virtual prospecting. Determine gap areas and set specific goals to improve your performance.

If you are between 18-26 for your total score, you are missing out on valuable business opportunities. Having a pool of qualified prospects is critical to the health of your pipeline, so improving prospecting skills should be at the top of your list of priorities.