



## ARE WE A GOOD FIT?

The purpose of this questionnaire is to obtain a baseline understanding of your organization, the goals and objectives you are looking to accomplish, and your time frame. (All responses will remain confidential.)

Please complete the questionnaire and submit it to [Manard@ManardWarren.com](mailto:Manard@ManardWarren.com), or fax it to us at: (972) 691-9952. Once submitted, a Representative will follow up accordingly.

### 1. TELL US ABOUT YOUR ORGANIZATION:

#### Contact Information

First Name: \_\_\_\_\_  
Last Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Company: \_\_\_\_\_  
Division: \_\_\_\_\_  
Address: \_\_\_\_\_  
Suite: \_\_\_\_\_  
City: \_\_\_\_\_  
State: \_\_\_\_\_  
Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Fax: \_\_\_\_\_  
Email: \_\_\_\_\_

#### Company Overview

Are you publicly or privately held? \_\_\_\_\_ PUBLIC \_\_\_\_\_ PRIVATE  
Primary business: \_\_\_\_\_  
Annual revenues: \_\_\_\_\_  
Date of year-end: Month: \_\_\_\_\_ Day: \_\_\_\_\_  
Are you a division or subsidiary of another company? \_\_\_\_\_ YES \_\_\_\_\_ NO  
If YES, name of parent company: \_\_\_\_\_  
Number of divisions or subsidiaries within your organization: \_\_\_\_\_  
Does each division/business unit have its own sales organization? \_\_\_\_\_ YES \_\_\_\_\_ NO

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Approximate number of direct sales people employed: (Enter "0" if not applicable.)

\_\_\_\_\_ North America    \_\_\_\_\_ Europe    \_\_\_\_\_ Asia Pacific

Approximate number of independent reps via channel partners/ resellers/distributors/ alliances: (Enter "0" if not applicable.)

\_\_\_\_\_ North America    \_\_\_\_\_ Europe    \_\_\_\_\_ Asia Pacific

List your top three issues or challenges in the last year:

- 1.
  
- 2.
  
- 3.

**2. TELL US ABOUT YOUR CURRENT SALES PROCESS:**

Select your current in-house sales process/methodology. (Check as many as apply.)

- \_\_\_\_\_ No formal selling process in place
- \_\_\_\_\_ "Home grown"
- \_\_\_\_\_ Wilson Learning Program (VSP, Counselor Selling, etc.)
- \_\_\_\_\_ Forum Corporation Programs
- \_\_\_\_\_ Miller Heiman (LAMP, Strategic Account Management, etc.)
- \_\_\_\_\_ Franklin-Covey (Helping Clients Succeed, etc.)
- \_\_\_\_\_ Acclivus Programs
- \_\_\_\_\_ Holden Programs
- \_\_\_\_\_ On Target/Target Account Selling/Siebel Program
- \_\_\_\_\_ Achieve Global Program
- \_\_\_\_\_ Other – Please describe:

What would you change in your current process and why?

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Check the titles of executives you'd like your sales organization to have more access to earlier on in your selling process:

Pres./CEO  
 COO  
 Exec. VPs of: \_\_\_\_\_  
 SVPs of: \_\_\_\_\_  
 VPs of: \_\_\_\_\_  
 Assist. VPs of: \_\_\_\_\_  
 Directors of: \_\_\_\_\_  
 Nat'l Managers of: \_\_\_\_\_  
 Other (type in title) \_\_\_\_\_

Describe why more frequent access to these executives is important to your organization.

**3. TELL US ABOUT YOUR GOALS AND OBJECTIVES:**

Provide a summary of what you want to accomplish, your needs, goals and objectives, and why they are important. (What are the new results you want more of?)

When do you need these results?

3 months       6 months       9 months       1 year  
 1 ½ year       2 years       Other

How many total sales people, account managers, business developers, sales managers and senior management do you have in your organization? \_\_\_\_\_

How many of those professionals would you put through these programs? \_\_\_\_\_

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When and where would you like the workshops or consulting to take place?

When:

\_\_\_\_\_

Where:

\_\_\_\_\_

Do you currently have budget or available funds to invest in these programs?

\_\_\_\_\_ YES          \_\_\_\_\_ NO          \_\_\_\_\_ I DON'T KNOW

If no, what is the process you must go through to garner a budget for these programs?

What is your time frame for making a decision to move forward?

\_\_\_\_\_ 1 month          \_\_\_\_\_ 3 months          \_\_\_\_\_ 6 months  
\_\_\_\_\_ 9 months          \_\_\_\_\_ 1 year          \_\_\_\_\_ Other

What is the likelihood of moving forward within the next 3 to 6 months?

\_\_\_\_\_ HIGH          \_\_\_\_\_ MEDIUM          \_\_\_\_\_ LOW

#### 4. TELL US ABOUT THE OFFERINGS OF INTEREST TO YOU

\_\_\_\_\_ Fear Free Prospecting & Self Promotion Workshop™

\_\_\_\_\_ Advanced Management Training Workshop™

\_\_\_\_\_ Prospecting To The Top Workshop™

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ Keynote Speaking Options for your corporate event

Please provide any further clarification in regards to your areas of interest:

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## 5. NEXT STEPS

Thank you for completing our pre-qualification questionnaire.

The next step is to submit the questionnaire via email to [Manard@ManardWarren.com](mailto:Manard@ManardWarren.com) or fax it to us at 972.691.9952. A representative will follow up within the next two business days to schedule a 30-60 minute conference call to go over your responses, answer your questions, and provide an overview of the offerings of interest to you and your organization.

Or, please provide us with two optional dates and times that work best for you and we'll contact you to confirm.

\_\_\_\_\_ **Yes**, please call me to schedule a follow-up conference call.

\_\_\_\_\_ **No** need to call me. I would like to schedule our conference call on the following date and time.

Option #1:      Date \_\_\_\_\_ Time \_\_\_\_\_

Option #2:      Date \_\_\_\_\_ Time \_\_\_\_\_

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