

Checklist

Library - Sales Project Task / Task - PTL 5.0 Qualify Project Contacts / Type Doc - Checklist

PTL 5.0 Qualify Project Contacts

- Gather a listing of the people and companies that are actively working on the project. This includes masons, architects, designers, and other contractors.
(Project Champions)

- Obtain the name of the person or persons who sign checks and make final decisions about materials and contractors.
(Primary Agents)

PTL 5.3 Pre-Qualify Project Criteria

- Work History
- Competitor Bids
- Type of Project
- Size
- Location
- Product Interest
- Complexity Level
- Project Acceptance

