

## PTL 5.0 Qualify Project Contacts

### Objective

Gather all possible information on a project, and to consider the project for basic feasibility.

## Procedure

1. Review the 5.0 checklist
2. Print the 5.0 forms, and use them to help you gather all needed information from the contact.
3. Contact customer, fill in the information, and offer to send pertinent marketing materials.  
Remember we are building a relationship as well as gathering business information.
4. List any reasons we should or should not pursue this project. Tell your supervisor, and make a decision about whether to proceed to the next step in PTL, getting the plans.

## **Key Points**

- Find out who will make the final selections for style, materials, and other important decisions.
- Find out who will do the work, designing, contracting, and installing.  
If a contractor has not been specified, can we be of assistance finding one?
- Pre-qualifying happens before we get plans, before we have all the information we really need. It is the first of several opportunities to consider the profitability of the project. Look for big and obvious reasons we should or should not continue



## PTL 5.0 Qualify Project Contacts

This is the point where an actual project comes into the picture. PTL 4.0 was about the contact, and projects should have come up in the conversation, but we actively consider the project here. If the contact has a project that might use cast stone we want to know about it. Gather what information you can about the project, and who is involved. You can even help the contact select contractors if he hasn't selected anyone yet.

When we have what information is available, we will want to consider the project. Is there some reason we don't want to proceed? At this early point in the PTL we haven't seen plans, so information on the project is limited. Unless the project truly appears profitless to Stone Legends, then there is probably no reason not to pursue the plans for the project, so we can evaluate the project more thoroughly.

### PTL Outline

#### PTL 3: Convert Lead to Contact

#### PTL 4: Gather Contact Data Details

- PTL 4.1 Contact Communications
- PTL 4.2 Contact Follow-Up
- PTL 4.3 Build Details
- PTL 4.4 Pre-Associate ID
- PTL 4.5 Contact Potential

#### PTL 5: Qualify Project Contacts

PTL 5.1 Assign Project Champions (Installers and Other Personnel)

PTL 5.2 Assign Primary Agents (Decision Makers)

PTL 5.3 Pre-Qualify Project

#### PTL 6: Evaluate Project

- PTL 6.1 Get Plans
- PTL 6.2 Evaluate Plans
- PTL 6.3 Plan Follow-up

#### PTL 7: Bid Preparation and Submittal

