



# Contact/Project Evaluation

Contact ID#: \_\_\_\_\_

Salesman: \_\_\_\_\_

## Contact Information

Contact (lead) Name or ID: _____
Contact Location: _____
Company Association: _____
Occupation: _____

### Contact Value Rating

- ☆☆☆☆☆  = 0-3
- ★★★★☆  = 4-5
- ★★★☆☆  = 6-7
- ★★★★☆  = 8-10
- ★★★★★  = 11-13+

## Criteria to Rate

# of employees: 0-25 (1) 25-100 (2) 100-200 (3) 200+ (4)
Social Status: Small Time (1) Known (2) Well Known (3)
Types of Projects: Small (1) Med (2) Large (3)
Type of Customer: 1x Order (1) Referred (2) Repeat (3)
Work History: None (0) Some (1) Average (2) A lot (3)

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Lead Source: \_\_\_\_\_

Total Value: \_\_\_\_\_

Associated Campaign: \_\_\_\_\_

Proactive:  Reactive:

## Project Information

Project Name or ID: _____
Project Location: _____

### Project Rating Point System

- A = 0-3
- B = 4-5
- C = 6-7
- D = 8-10
- E = 11-13
- F = 14+

## Criteria to Rate

Prior Relationship: Yes (1) or No (0)
Repeat work history: 1 Job (1) 2-3 Jobs (2) 4+ Jobs (3)
Competition: Light (3) Moderate (2) Heavy (1)
Sq. Footage of Project: 2,000-4,000 (1) 4,000-10,000 (2) 10,000+ (3)
Probability of close: Low (0) Medium (1) High (3)
Mold:Stone Ratio (Profitability): 1:10 (0) 1:25 (1) 1:50 (2) 1:75 (3)
Bid Due Date: 1-5 Days (0) 6-10 Days (1) 10+ Days (3)

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Total Score: \_\_\_\_\_