

Hello  
NACE  
Experience  
2022

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The how and  
why of  
effectively  
vetting your  
clients

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**YES**



**NO**



**MAYBE**

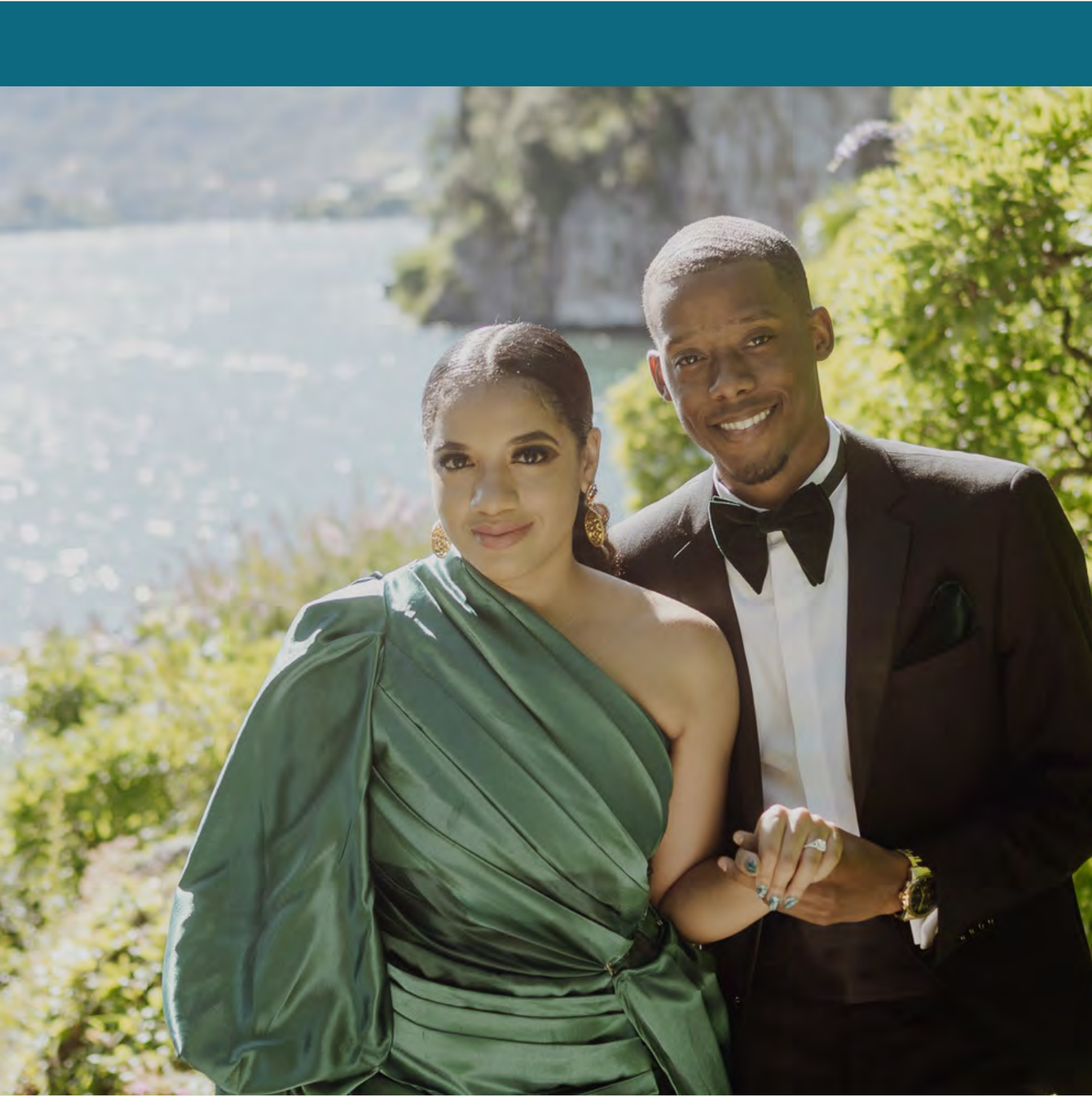


# What is Qualifying/Vetting

Qualifying is determining whether or not that person who called to find out about your services is WORTHY

...WORTHY?!

**KNOW  
YOUR  
WORTH**



**YES! WORTHY!**

# Why Does Qualifying Matter?

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Think of it like dating....



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When you methodically qualify inquiries,  
you are using your time and energy wisely

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# 57%

Of the sales process is complete by  
the time you get a phone call.

Source: Conference Board

Know Your  
Best and  
Worst Types  
of Clients







Google Is  
your friend!!

# Step 1

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**ELIMINATE  
FAKE OPPORTUNITIES  
QUICKLY!**



**The biggest  
mistake you can  
make is to keep  
working leads  
that will never  
convert or are  
not your true  
client.**

TIME IS VALUABLE

TIME IS A NON-RENEWABLE  
RESOURCE

ONCE GONE, YOU CAN'T GET  
IT BACK

# Step 2

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## **THE THREE FITS**

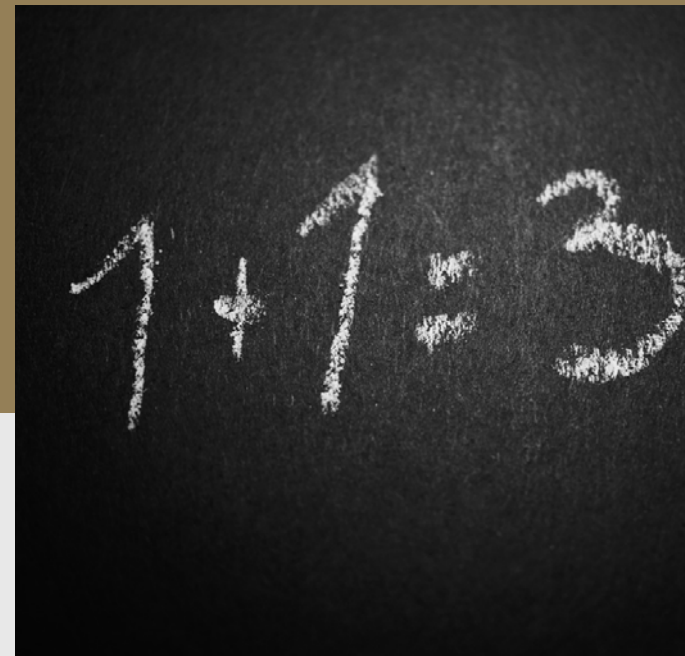
# The Three Fits



## PRODUCT-CUSTOMER FIT

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the service you provide can  
serve the needs of customer



## ECONOMICS-CONSUMPTION FIT

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Do the economics make sense  
for both parties



## PROBLEM-VALUE FIT

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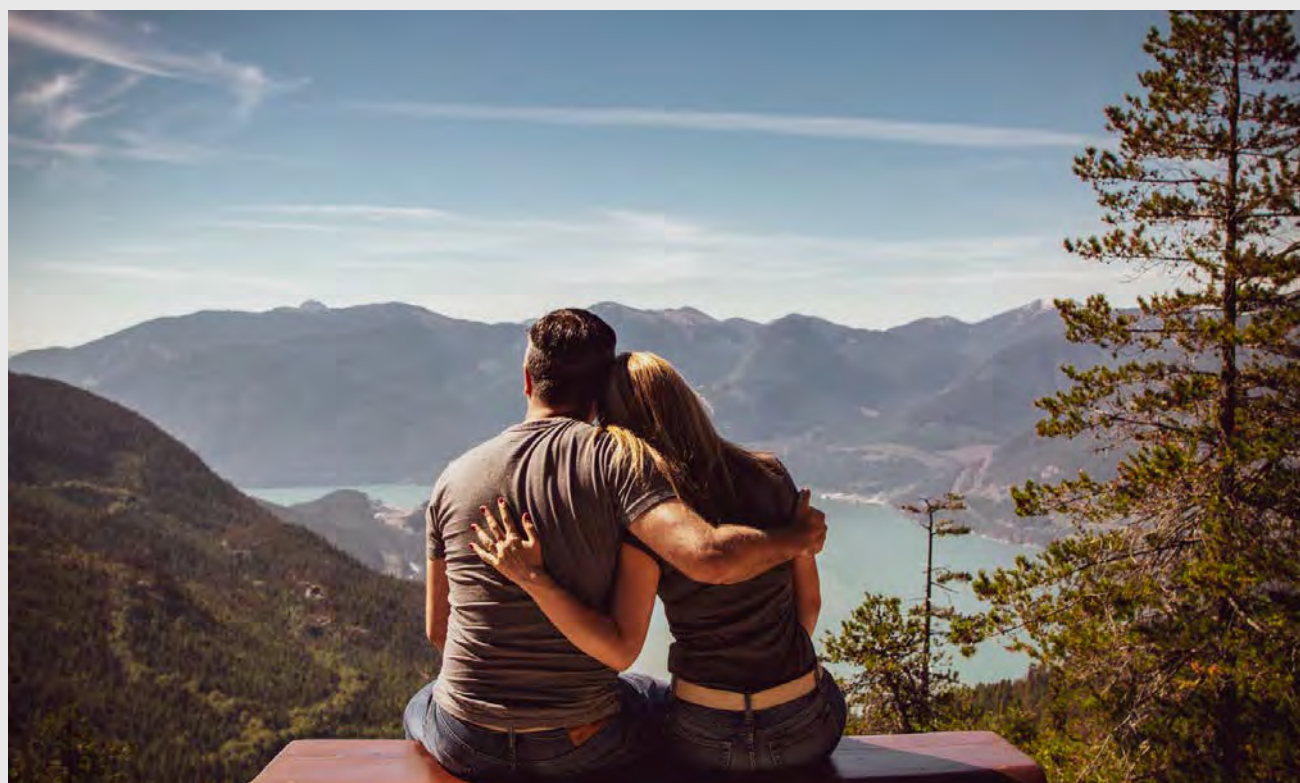
Does that customer sees your  
value

# Step 3

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**PROPERLY DEFINE YOUR  
IDEAL CLIENT**





## A QUALIFIED LEAD

Couple that meets the basic criteria for booking your services.

- They're engaged,
- They want to get married in your service area,
- Are interested in the service you provide.

VS



## AN IDEAL CLIENT

Is the couple that **YOU** most want to book.

- They are a qualified lead
- They possess certain traits and sensibilities you love working
- Are ready to work with you the other pros you collaborate best with.



*1: DEMOGRAPHICS*



*2: NEEDS*



*3: PAIN POINTS*



*4: RELUCTANCE*



*5: LIFESTYLE*



*6: MEDIA*

# Create a Client Avatar

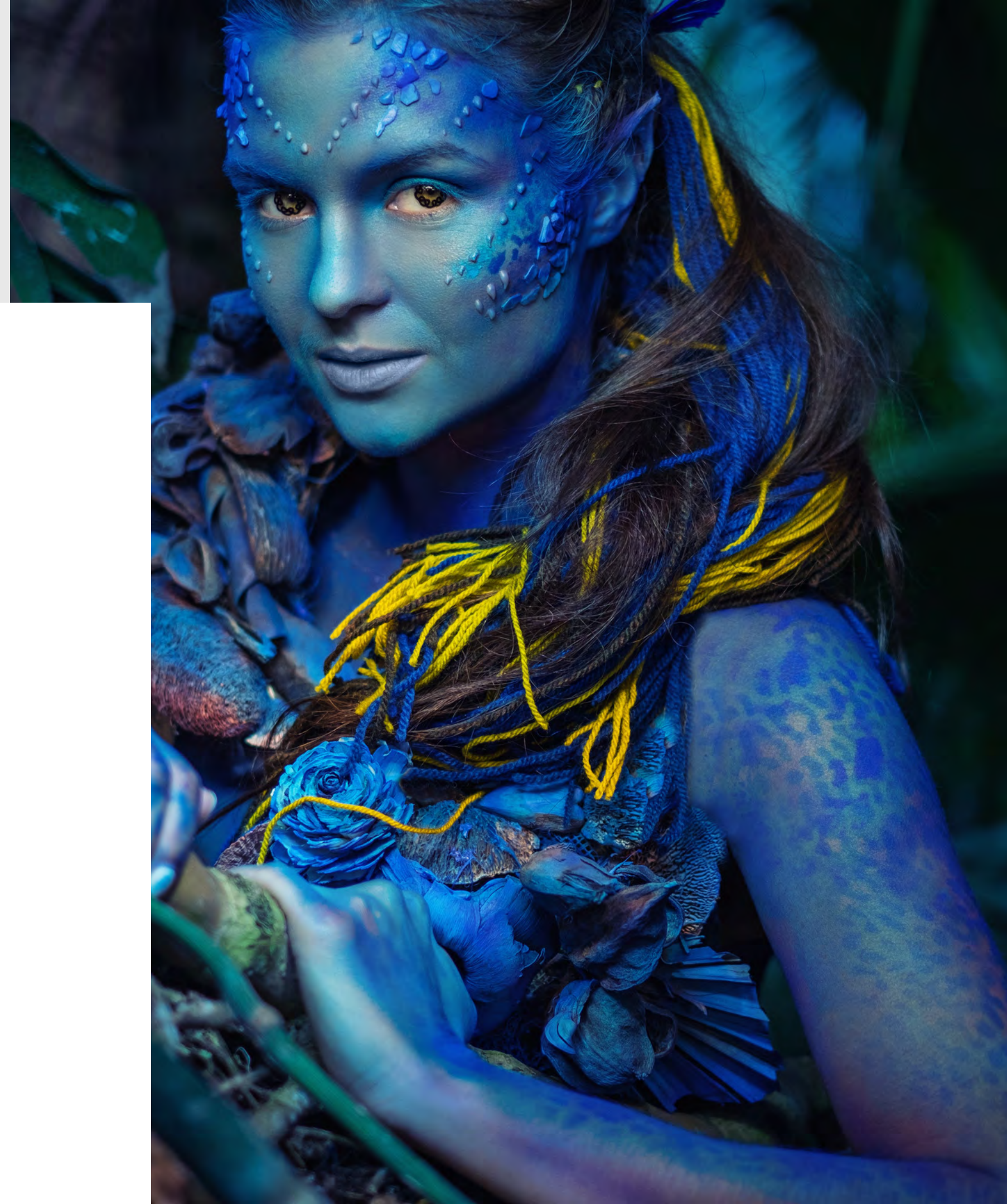
To attract the right clients, it's not about just telling your story.

It's about crafting a narrative that revolves around your customer's story.

In other words, your buyers' motivations write the story -- and strategy.



Qualifying questions are used to identify strong prospects based on your ideal Client Avatar



# Step 4

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**ASK GREAT QUALIFYING  
QUESTIONS**



# Categories of Questions

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THE BASICS

THE ESSENTIAL

THE INTERMEDIATE

THE ADVANCED

# THE BASICS

WHO

WHAT

WHEN

WHERE

WHY/ GOALS

HOW



**The Essential**

**BUDGET**

# The Intermediate

- WHAT IS THE SCOPE OF WORK YOU SEEK?
- HAVE YOU WORKED WITH EVENT PROS IN THE PAST?
- WHAT ARE YOUR EXPECTATIONS?
- HAVE YOU BEEN TO OTHER EVENTS SIMILAR TO THIS ONE THAT YOU LOVED OR HATED?
- HOW DO YOU SEE THIS COLLABORATION WORKING?
- DO YOU HAVE ANY CONCERNS ABOUT THE EVENT? WHAT ARE YOUR PAIN POINTS?

- HOW WOULD YOU PERSONALLY LIKE TO FEEL AT YOUR EVENT?
- WHY DID YOU CHOOSE TO DO A CONSULTATION WITH ME?
- ARE YOU OPEN TO ALTERNATIVE SUGGESTIONS OR IDEAS AS THEY COME UP?
- WHAT IS YOUR PREFERRED METHOD OF COMMUNICATION?
- WHEN YOU PICTURE WORKING WITH AN EVENT PROFESSIONAL, WHAT DO YOU IMAGINE THAT EXPERIENCE TO BE LIKE?

The Advanced

# Always....

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## ASK WHERE DID THEY FIND YOU?

Great Marketing  
information



## CREATE A SALES CALL SHEET

to help keep yourself  
on track and organized  
during your call



## LISTEN!

Spend **MORE** time  
listening than you do  
asking questions

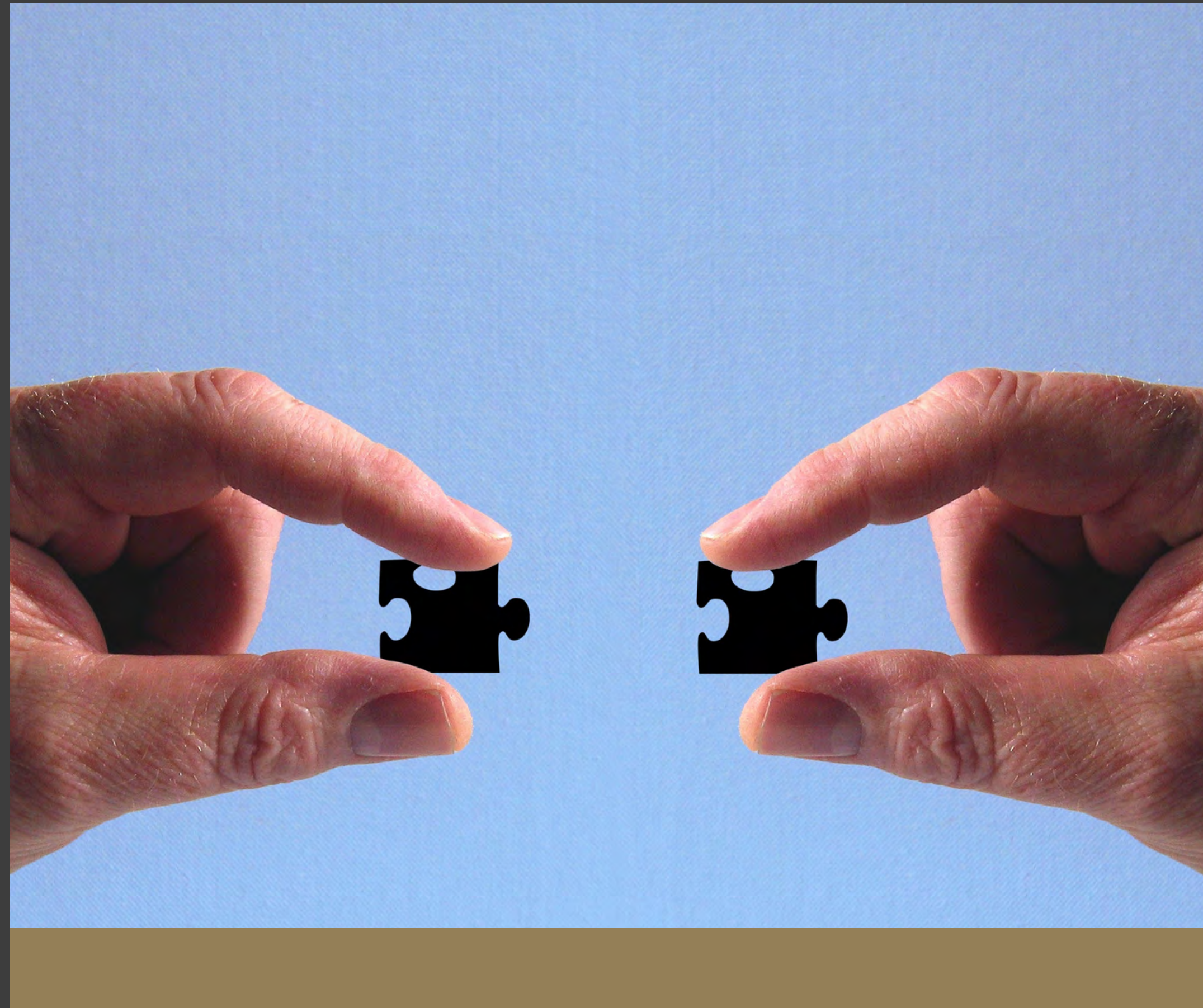


Sometimes the key to knowing whether or  
not a lead is qualified is not obvious

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# APPROACH PROSPECTING WITH A PARTNERSHIP MENTALITY

Great potential clients generally  
bring a partnership mentality





*WORDS OF INSPIRATION*

"To build a long-term, successful enterprise, when you don't close a sale, open a relationship."

– Patricia Fripp

# Get In Touch With Us

## SOCIAL MEDIA HANDLES

@ByBrianGreen

## *EMAIL ADDRESS*

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