Activity 51-A
Tracking Your Account Activity and Status
Using The "Sales Contact Performance Profile" Form

SP 3"

sales
CONTACT PERFORMANCE PROFILE

P¹ = CONTACT PROFILE

Organization/Firm Name: _____
Address: _____
City: _____
Postal Code: _____
Fax: _____

Primary Contact Name: _____
Box/Mail Stop: _____
State/Province: _____
Telephone I: _____
Telephone II: _____

Org./Firm Birthday: _____
Primary Product/Service/Mission Statement: _____

Contact Birthday: _____

Secondary Product/Service/Mission Statement: _____

# of Members/Employees: _____
Previous Year Earnings/Budget: _____

Org./Firm Net Worth: _____
Officers' Names: _____

P² = BACKGROUND PURPOSE PROFILE

Product/Solution presented: _____
Date of last interaction: _____
My position on this is: Exclusive--Dominant--Shared--Below--Unknown
Single objective here is: _____
Secondary objective is: _____
Psychological profile: _____
Why are they considering my...: _____
Have I identified all decision makers: YES/NO
Have all levels of the decision loop agreed: YES/NO/UNKNOWN
Has a decision date been set: YES/NO

Is there a prior relationship here: YES/NO   Competitor(s): _____
Was the outcome a "Win/Win": YES/NO   .
Their timing on this is: Urgent--Working on it--No rush--Unknown

Have I visited with each: YES/NO   Can I answer their needs: YES/NO
Is there interest in my Product/Solution: YES/NO   Is there interest in my competition: YES/NO
Am I using all networking resources: YES/NO   Have I asked for the order: YES/NO

P³ = PERFORMANCE PROFILE

TYPES of BUYERS (TB)	CURRENT POSITION (CP)	BUYERS INVOLVED	(TB)✔ (CP)	NEXT STEP	WHO/WHEN/WHERE	S.T.O.P.'s ✔
F=Financial	G=Growth	1.				
T=Technical	T=Trouble	2.				
U=User	S=Stable	3.				
C=Cheerleader	OC=Over Confident	4.				
		5.				

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