

# 9 Things You Should Know About Every Sales Prospect

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In industries with sales motions that may take a few days or longer, there are two crucial questions salespeople will have about their prospects:

- “Where is my prospect in the sales cycle?”
- “What do I know about this person or organization?”

When you have a robust answer to that second question, you create more opportunities for that salesperson to move the prospect along the sales cycle, from prospect to lead to customer.

In other words, **it pays to know your prospects well.**

Here, then, are nine crucial pieces of information to know about your prospect.

## 1. What past interactions have you had with the prospect?

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The first step toward building deep relationships with prospects is to get a comprehensive view of how that relationship has evolved. This history will help your salespeople understand what is important to that prospect and how your business can help.

With fresh prospects, you might have only had one or two past interactions—maybe you met briefly at a conference, or they called you to inquire about a product’s availability.

When you have a running account of all previous interactions, then you have a record of your relationship with that prospect: You know where that person is in their buying cycles, what business goals they’re trying to achieve for themselves, or what personal challenges they’re trying to solve.

This is important to track because prospects are often not yet ready to buy, even after several interactions. By focusing on the relationship you have with that prospect, you frame each subsequent interaction as a chance to be helpful or to solve a problem for that person. When that person is ready to buy, then, you will have positioned yourself as a trustworthy partner.

## 2. How did you connect with the prospect in the first place?

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Prospects can come to you from a variety of places. Perhaps they were referred to you by other customers. Perhaps this is someone you met at a tradeshow. Perhaps this is someone who opted into your newsletter with an email address.

In aggregate, this information is helpful for establishing context in your relationships with prospects and identifying which of your marketing activities are proving effective. If half of your company’s prospects are coming to you via trade shows, for example, then

you can make a strong case for investing more money into attending trade shows.

### **3. How does this person prefer to be contacted?**

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Your prospects are busy, and they will be more open to your outreach if it comes at a time that's convenient for them. That might be before 9 a.m. their time, or it might be during their lunch hour, or it might be during after-work hours.

Note that, and schedule your follow-ups for those times.

Different prospects also have their own preferred communication channels. Some people like to jump on the phone for a chat, and others prefer an email or LinkedIn message so they can take their time to prepare a response. Note this, too, and follow-up via the channel that suits your prospect.

### **4. What social media does the prospect use?**

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Social media is a great fact-finding tool. If your prospect is active on LinkedIn, Twitter, Facebook, Instagram, TikTok, wherever then you have a direct line of sight into what that person cares about.

Be sure to note which social platforms your prospect is active on and give them a follow if it's appropriate to do so. Also, consider paid ads on social sites that your prospects are active on.

### **5. Who are the competitors in the prospect's market?**

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When selling to business clients, there is an added dimension that they are operating in a competitive space. Their own competitors could be applying pressure and creating pain points.

Imagine you are a retail consultant, and your prospect works for a consumer-goods brand that is trying to establish its e-commerce presence. This was the case for many brands during the early stages of the COVID-19 pandemic, and each brand was looking for an edge over its competitors.

As a retail consultant, you need to be aware of that context and tailor messages to your prospect accordingly. Do some market research on behalf of your prospect. Find out what their competitors are up to, and where those competitors are struggling.

Demonstrate this understanding, and it will be easier for your prospect to connect the dots between your knowledge and how your services can provide the competitive edge the prospect's company needs.

### **6. Is the prospect already using a similar product or service to yours?**

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"There are seven words that strike fear into the heart of your salespeople," Ken Dooley writes at [Resourceful Selling](#). "They are: 'I am happy with my present supplier.'"

As good salespeople know, however, this isn't the end of the relationship. As Dooley points out, supplier relationships have their ups and downs. Suppliers can be late with shipments, for example, or an update to the supplier's billing software causes problems with invoicing.

With such prospects, the important thing to do is build a relationship. That relationship could be a huge asset down the line when the prospect is no longer as happy with the incumbent supplier.

## **7. What do you know about the prospect's company?**

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When you are selling to other companies, it's important to understand the business context in which a prospect is operating.

Go beyond understanding the prospect's customers and market. Look for information about the company's growth or changes in management, too.

For example, imagine a self-employed consultant who specializes in selling services that specialize in diversity and inclusion training. This person likely works with other companies' human resources managers to deliver that training.

Now, imagine that consultant has a prospect whose company just received a \$2 million round of funding so it could triple the size of its software development team. That's a scenario in which HR would play a leading role.

By understanding the bigger forces driving that prospect's work, the consultant can begin to tailor their prospect-nurturing activities accordingly. Understanding what's happening at a company can inform a seller on how hot a potential lead may be.

## **8. Whom does your prospect report to?**

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In business-to-business sales, deals can be complex, and multiple people might have a say in whether or not the deal goes through. Your sales team will need to know who these people are so they can prepare messages for and handle objections from a variety of people.

The first person to identify in this group is the person your prospect reports to. If your prospect is a VP of Marketing, for example, they might report to the CMO.

Once you understand this, think about that relationship from the prospect's perspective. Maybe that CMO is a new hire who's brought an ambitious new mission to the marketing team, and your prospect is looking for a way to make an immediate impact. Or, perhaps your prospect simply has to bring measurable results back to their boss.

Thinking about your relationships with your prospects in these terms will help your salespeople craft messages that can really resonate.

## **9. Who else influences a sale in your prospect's company?**

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When a group of people in your prospect's company are responsible for a single purchasing decision, roles tend to emerge on the customer side:

- Some people are actual decision-makers who directly control a purchase decision.
- Some people will act as influencers and push one way or another without having direct say in whether a deal goes through.
- Some people will act as blockers and gatekeepers, and they will throw up obstacles during the sales cycle, often for personal reasons.

Learning how to distinguish decision-makers, influencers, blockers, and gatekeepers is a skill that salespeople develop over time. For now, it's enough to know that these people exist.

And as CEB consultants Nicholas Toman, Brent Adamson, and Cristina Gomez note, these people tend to impact the middle of a sales cycle. This is when the competing priorities and hidden agendas of the members of the buying group come to the surface.

Again, navigating those challenges are what top salespeople learn to do well. During this early prospecting stage, the important thing to remember is that these people can and likely will emerge at some point during sales conversations.

That's why it's important early on to make note of anyone who appears to have influence over a potential sale. That way, your salespeople can anticipate any objections thrown up by blockers and gatekeepers, and they can nurture relationships with influencers before the focused sales conversations commence.

And where should sellers track all of that information? CRM is especially valuable for your sales teams because that's where all of this information on your prospects lives. As your business grows, that information will build the foundation of all your customer relationships. You will then be able to upsell more precisely or be responsive to individual customer needs because you've made the effort to get to know everyone you do business with.