

Prioritize Tool

Directions:

1. Identify up to five criteria you will use to evaluate prospective clients.
(For example, large revenue, have a referral, already doing business there, doing good work with like company, large presence in your region, would lead to a lot of other business.)
2. Each criterion is assigned a weight (point value). Write the most important criterion in the column with the highest weight. Put the next most important criterion in the next column and so forth.
3. For each client, assign a 1–5 rating for each criterion (1 = not relevant; 5 = extremely relevant).
4. Your top priorities are the prospective clients with the highest total score.

Company	CRITERION 1					CRITERION 2					CRITERION 3					CRITERION 4					CRITERION 5					TOTAL					
	①	②	③	④	⑤	①	②	③	④	⑤	①	②	③	④	⑤	①	②	③	④	⑤	①	②	③	④	⑤	①	②	③	④	⑤	
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