

LEAD QUALIFICATION EVALUATION FORM

Use for leads and prospects that fit your customer profiles/target markets to determine qualification levels.

Lead Name: [lead name]

Lead Generated: [date generated]

Lead Source: [where the lead was generated from]

BANT Analysis (check one box for each category)

Budget-Ask about desired spending or any budget constraints

- Lead's budget/spending capabilities are too far outside our pricing
- Lead's budget/spending capabilities are slightly outside our pricing
- Lead's budget/spending capabilities are within our pricing

Authority-Ask if they are the decision-maker and/or if any other people should be involved

- Lead contact is not a decision-maker and has no influence on these purchase decisions
- Lead contact is not a decision-maker but has some influence on this purchase decision
- Lead contact is one of a few decision-makers for this purchase decision
- Lead contact is the sole decision-maker for this purchase decision

Needs-Ask if they have a current provider, what they like and dislike about them, and if they are actively seeking new options

- Lead currently has a provider for this solution and is not looking to change
- Lead does not have a provider for this solution but is not actively looking for one
- Lead currently has a provider for this solution but is looking for a new one
- Lead does not have a provider for this solution and is actively looking for one

Timeline-Ask about the estimated timeline they're looking to implement your product or service

- Lead is unsure if and when they want to implement this solution
- Lead wants to implement this solution in six months to a year
- Lead wants to implement this solution in three to six months
- Lead wants to implement this solution in less than three months

Lead Scoring (showing interest)

Marketing Qualifying Events

- [Marketing qualifying action (clicking link, downloading an asset, etc)]: [Points]
- [Marketing qualifying action (clicking link, downloading an asset, etc)]: [Points]
- [Marketing qualifying action (clicking link, downloading an asset, etc)]: [Points]

Total Marketing Qualifying Points: [Points]

Sales Qualifying Events

- [Sales qualifying action (positive sales conversation, requests pricing, agreed to presentation, etc)]: [Points]
- [Sales qualifying action (positive sales conversation, requests pricing, agreed to presentation, etc)]: [Points]
- [Sales qualifying action (positive sales conversation, requests pricing, agreed to presentation, etc)]: [Points]

Total Sales Qualifying Points: [Points]

Total Lead Score: [Total Score]

BANT Analysis: [Great, Good, Moderate, Poor]