

# LEAD QUALIFICATION EVALUATION FORM

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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]**