

# KloudReadiness Worksheets

## Worksheet #6 Lead Qualification Template

In this worksheet we are going to review a lead qualification template that can be used by your sales team when following up leads generated by your marketing programs. Please examine this template and see if you agree with these qualification guidelines. You may want to adapt some of its qualifiers to meet the specific characteristics of your business. Test the form with a few of your existing leads to see if it provides a useful and accurate rating system for your qualifying your sales leads. If you want to make changes to any of the qualifiers, just add your comments in the shaded box below each statement and review with others in your company. Then use the form religiously for all of your sales leads.

### 1. Rate the **Pain Level** of your prospect.

From the statements below, please check the box next to the one that best represents the pain level of your prospect.

- Rating = 5 (Extreme Pain):** Prospect has experienced a “compelling event” (system failure, service outage, data loss, security breach, etc.) and is faced with a large financial expense to address the situation.
- Rating = 4 (Significant Pain):** Prospect has experienced a “compelling event” but is not sure of the financial impact on the company or the expense to address it.
- Rating = 3 (Moderate Pain):** Prospect has NOT experienced a “compelling event” but is faced with a large financial cost to meet a critical business requirement.
- Rating = 2 (Low Pain):** Prospect has NOT experienced a “compelling event” but is open to evaluating a cloud services alternative to how they utilize technology.
- Rating = 1 (No Pain):** Prospect has no identifiable pain points or motivation to change how they utilize technology to support their business operation.

**Rate the **Solution Fit** of your prospect.**

From the statements below, please check the box next to the one that best represents how well your cloud & managed services solution fits the needs of your prospect.

- Rating = 5 (Perfect Fit):** Your cloud managed services solution is an exact match for the technical and business requirements of your prospect. There are no missing elements and your pricing is within budget range and competitive options.
  
- Rating = 4 (Slight Gaps):** You solution is a very good fit overall but there are few missing features that you can easily overcome.
  
- Rating = 3 (Moderate Gaps):** Your solution has a couple of noticeable gaps in functionality and/or your pricing is noticeable higher than your competition.
  
- Rating = 2 (Large Gaps):** There are large gaps in your solution. The prospect would have to change their requirements for you to win the business.
  
- Rating = 1 (Not a Fit):** This prospect is not a good fit for your solution. Unless you expect future requirements to change, you may want to disqualify this lead.

2. Rate the **Business Value** of your solution to your prospect.

From the statements below, please check the box next to the one that best represents the business value your solution can provide to this prospect.

- Rating = 5 (Excellent Value):** Your solution can provide at least two of these three benefits – a *significant* level of cost savings, increased productivity or risk reduction.
  
- Rating = 4 (Very Good Value):** Your solution can provide at least one of these three benefits - a *significant* level of cost savings, increased productivity or risk reduction.
  
- Rating = 3 (Good Value):** Your solution provides one of the above benefits but with a *moderate* level of cost savings, productivity gain or risk reduction.
  
- Rating = 2 (Unknown Value):** You feel that is value in your solution for this prospect but have not determined the level of business value at this time.
  
- Rating = 1 (Low Value):** You have tried but cannot identify a significant level of business value for your solution based on the prospect's current needs.

### 3. Rate the **Decision Process** of your prospect.

From the statements below, please check the box for the one that best represents the authority level, approval process and funding availability for this prospect.

- Rating = 5 (Clear Process):** You are talking to the decision-maker, he or she has the authority to award the business and there is funding available for your solution.
  
- Rating = 4 (Some Unknowns):** You understand the process but you are not talking to the decision-maker yet or your decision maker has not yet secured funding.
  
- Rating = 3 (Complex Process):** There is no single decision-maker; a committee must approve the decision as well as the funding required for your solution.
  
- Rating = 2 (Many Unknowns):** You have not identified either the final decision-maker or the funding source for your solution at this time.
  
- Rating = 1 (Obstacles Exist):** You have uncovered problems with funding or a significant obstacle in the decision process that reduces your probability of winning.

#### 4. Rate the **Time Frame** for which your prospect will make a decision.

From the statements below, please check the box that best represents the timeframe in which you believe a decision will be made and the business will be awarded.

- Rating = 5 (Less than 1 Month):** Your prospect has an immediate need and/or you are late in the sales process but still have a very viable chance to win.
  
- Rating = 4 (1 to 2 Months):** Your prospect will make a decision and award the business to someone in less than 2 months.
  
- Rating = 3 (2 to 3 Months):** Your prospect will take from 2 to 3 months to decide.
  
- Rating = 2 (3 to 4 months):** Your prospect will take from 3 to 4 months to decide.
  
- Rating = 1 (Greater than 4 months):** Your prospect is not in the buyer zone and will take at least 4 months or longer to become a serious buyer.

Congratulations! You have completed **Worksheet #6: Lead Qualification Template**. This document will provide a formal rating system for your sales leads. If your lead has a score of 20 or more, you have high quality lead. Scores or 10 to 20 are good “marketing leads” that can be targeted by lead nurturing programs. Scores below 10 should be discarded as unqualified leads.