



Lead Qualification Definition Template

USE THIS TEMPLATE TO OUTLINE THE DEFINITION OF A WELL-QUALIFIED LEAD.

My ideal lead is:

An accounting manager from a law firm with more than 250 employees and between \$20 and \$50 million in revenue who is interested in accounting software or is struggling with spending too much time on payroll processes.

Acceptable Budget Range

If expressed, budget should be at least \$25,000.

Acceptable Company Size

Company should have at least 100 employees.

Acceptable Industries

- Healthcare
- Education
- Financials
- Legal & Compliance

Acceptable Project Timeline

- Minimum deliverable time: 4 weeks
- Maximum delay: 6 months

Acceptable Company Departments

- Human Resources
- Legal
- Accounting

Acceptable Pains

Complicated/ inefficient process for:

- Tax preparation
- Check printing
- Payroll services
- Finance tracking

Warning Signs:

Do NOT send leads over if they...

- Have expressed a budget less than \$15,000
- Have the title "Marketing Associate"
- Are from a company with less than 50 employees

Be wary of sending leads over if they...

- Have expressed a budget less than \$25,000
- Have the title "Marketing Manager" or "Paralegal"
- Are from a company with less than 100 employees

Lead Hand-Off Process:

Marketing will perform an initial qualification assessment within 1 day of lead generation. After qualification, marketing will assign the lead over to the main sales pipeline, which will send an alert to sales management that an opportunity is ready to be assigned to a sales rep.