

Enhanced Lead Qualification Framework - Based on Real Customer Behaviors

Essential Information to Gather (Observed Patterns)

Project Context - Real Examples

- **Project Type:** Patios, basement reinforcement, rebar cages, structural work
- **Timeline:** "Project coming up in [month]", "not ready yet", "can pick up today"
- **Scope:** "Over 100 meters", "quite a few jobs", specific quantities (2 pieces vs sheets)
- **Decision Timeline:** "I'm not ready yet", "when we're ready", "probably September"

Customer Profile - Actual Indicators

- **Company Type:** Landscapes, construction companies, contractors
- **Size Indicators:** "Quite a lot of it", "quite a few jobs", volume patterns
- **Geographic Location:** Specific site references (Manor Road, South Winster)
- **Industry Sector:** Landscaping, general construction, specialized contractors

Decision Process - Real Behaviors

- **Decision Maker Status:** Direct phone answering, project authority indicators
- **Approval Process:** "I'll give you a shout when ready", autonomous decision making
- **Budget Authority:** Price discussion engagement, competitive quote gathering
- **Influencers:** Individual decision makers, some delegation patterns

Current Situation - Market Intelligence

- **Existing Suppliers:** "We're getting quite a good deal at the moment", price benchmarks
- **Pain Points:** Workshop capacity issues, stock availability, timing pressures
- **Urgency Level:** "Can pick up today", "not ready yet", project timing
- **Purchase History:** Previous order references, relationship history value

Qualification Outcomes - Enhanced with Real Patterns

High-Priority Leads

Characteristics:

- Immediate need expressed ("can pick up today")
- Active projects mentioned ("quite a few jobs actually")
- Existing customer with new project ("project coming up next month")

- Willing to share competitive pricing information
- Volume indicators ("quite a lot", "over 100 meters")

Follow-up Action:

- For urgent needs: Immediate sales team escalation
- For volume customers: Competitive pricing discussion
- For competitive situations: Emphasize NextDay speed advantage
- Direct email with competitive pricing capability

Timeline: Urgent needs = immediate escalation, others = same day response

Medium-Priority Leads

Characteristics:

- Future projects with specific timing ("September", "next month")
- Previous customers staying in touch
- Gathering quotes but not urgent
- Relationship maintenance opportunities

Follow-up Action:

- Email with expanded product information
- Calendar reminder for project timing
- Competitive quote preparation when ready
- Relationship maintenance contact

Timeline: Email within 24 hours, follow-up based on stated timing

Low-Priority Leads

Characteristics:

- Vague timing ("not ready yet")
- No immediate projects identified
- Limited engagement in price discussion
- Contact gatekeepers rather than decision makers

Follow-up Action:

- General information email
- Longer-term follow-up schedule

- Add to newsletter/marketing list

Timeline: Email within week, quarterly check-ins

Follow-up Preferences - Observed Behaviors

Contact Methods

- **Phone:** Immediate needs, relationship customers, urgent requirements
- **Email:** Busy customers, quote delivery, detailed information sharing
- **Same Day:** Emergency requirements, stock availability questions

Information Delivery - Real Customer Requests

- **Immediate:** Contact details, stock availability, basic pricing indication
- **Scheduled:** Detailed quotes with competitive analysis, expanded product info
- **On-Demand:** Specific project quotes, volume pricing, technical specifications

CRM Integration - Enhanced Triggers

Lead Scoring - Real Indicators

High Score Triggers:

- "Quite a few jobs" = Active project pipeline
- "Can pick up today" = Immediate revenue opportunity
- Previous order history = Proven customer
- Volume indicators = Higher value potential
- Price sharing willingness = Serious buyer

Medium Score Triggers:

- Specific future timing mentioned = Planned opportunity
- Competitive shopping = Active decision process
- Professional communication = Legitimate prospect

Low Score Triggers:

- Vague timing = Uncertain opportunity
- Limited engagement = Lower priority

Categorization - Behavioral Based

- **Hot:** Immediate needs, existing customers with new projects, urgent requirements
- **Warm:** Future projects with timing, competitive shopping, relationship maintenance

- **Cold:** Vague inquiries, distant timing, limited engagement

Next Steps - Action Triggered

- **Immediate Quote:** Same-day needs, competitive situations, volume opportunities
- **Competitive Analysis:** When customer shares current pricing
- **Relationship Email:** Previous customers, future project planning
- **Calendar Follow-up:** Specific project timing mentioned

Handoff Process - Enhanced

- **Sales Team Notification:** High-value volume customers, complex competitive situations
- **CRM Update:** All customer pricing intelligence, project timing, relationship history
- **Appointment Scheduling:** When customer requests specific meeting times

Special Qualification Categories - New Insights

Volume Customers (High-Usage Pattern)

Identify By:

- Regular usage patterns mentioned
- Large quantities discussed ("over 100 meters")
- Established supplier relationships
- Price sensitivity but relationship focused

Special Handling:

- Volume pricing consideration
- Direct management involvement
- Competitive analysis required
- Regular relationship maintenance

Emergency/Urgent Customers (Equal Angles Pattern)

Identify By:

- Same-day pickup requirements
- Multiple supplier calling pattern
- Specific immediate needs
- Time-pressed communication style

Special Handling:

- Immediate stock check
- Same-day availability confirmation
- Premium pricing acceptance likely
- Quick decision turnaround

Payment/Process Issues (Lorenzo, Ben)

Identify By:

- Payment link failures mentioned
- Website technical issues
- Process-related problems

Special Handling:

- Immediate alternative solutions offered
- Multiple payment method options
- Technical issue escalation if needed
- Follow-up to ensure resolution

Website Abandonment Recovery (Ben Parker pattern)

Identify By:

- Viewed website but didn't complete order
- Pricing concerns mentioned
- Product research without purchase

Special Handling:

- Direct pricing conversation
- Negotiate on the spot
- Offer revised quotes immediately
- Address specific pricing objections

Product Confusion Cases (Anton pattern)

Identify By:

- Wrong product category inquiries
- Structural vs. reinforcement confusion
- Unclear product requirements

Special Handling:

- Clear product category explanation
- Redirect to appropriate suppliers if needed
- Educational approach about product lines
- Professional refund handling when necessary