

## NextDaySteel Lead Qualification Framework

Use this guide when caller expresses interest in quote, future supply, or ongoing project.

**GOAL:** Gather just enough info for clean quote request without sounding like a form.

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### RFQ QUALIFICATION FRAMEWORK

When Customer Wants Quote: “Let me take your requirements now and get our sales team to prepare a quote for you. If you don’t have time now, I can WhatsApp or email you so you can reply with the details when convenient.”

Core Questions (Ask in this order):

- 1 “What type of steel or product do you need?”
- 2 “Roughly how much or what lengths are you after?”
- 3 “What’s the delivery postcode?”
- 4 “When would you need it on site?”

If Customer Unsure: → “Even a rough idea helps — I’ll pass it along for a proper quote.”

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### SYSTEMATIC INFORMATION COLLECTION

Project Details: - “What type of construction project is this?” - “What’s the delivery address?” - “When do you need the materials delivered?”

Specification Requirements: - “Do you have engineer specifications I can note down?” - “What type of reinforcement - rebar, mesh, or accessories?” - “Any specific sizes or grades required?”

Quantity Assessment: - “Do you have quantities calculated?” - “Is this for the full project or a partial delivery?” - “Any additional requirements I should note?”

Decision Process: - “Are you the decision maker for this purchase?” - “Anyone else involved in supplier approval?” - “What’s your timeline for making a decision?”

Follow-up Preferences: - “Best way for our sales team to follow up - call, email, or WhatsApp?” - “Best time of day to reach you?” - “Any specific person they should ask for?”

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### LEAD TYPE DETECTION

Customer Classification (Reference nds-personas.txt):

One-off or DIY? → Ask if they need help understanding next steps → Offer technical team consultation

Regular buyer or site? → Ask about delivery windows and bulk needs → Focus on ongoing relationship potential

Procurement? → Ask if they need formal quote PDF or just callback → Emphasize documentation and professional process

Site foreman/tradesperson? → Confirm if they have purchasing authority → May need to identify actual decision maker

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#### DELIVERY VERIFICATION PROCESS

Address Verification (CRITICAL): “What’s your delivery address? I need to verify we can deliver there as some products cannot be delivered to all parts of the country.”

Coverage Check: - Mainland UK: Next-day delivery available - Islands: 2-3 days via ferry connection  
- London area: Same-day delivery within 30 miles - Remote areas: May require special arrangements

When Address Issues: “Let me check our delivery options for your location and have our logistics team confirm the best arrangement for you.”

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#### TIMELINE & CUTOFF CONSIDERATIONS

Delivery Timing: - Always ask: “Would this be for next-day delivery?” - If yes, check current time vs 1 PM cutoff - If no, offer to schedule quote for right timeframe

Cutoff Awareness: - Before 1 PM: “If you order by 1 PM today, we can deliver tomorrow” - After 1 PM: “Orders placed now would be delivered the day after tomorrow” - Emergency: Transfer to emergency supply team

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#### INTEREST LEVEL ASSESSMENT

High Interest Indicators: - Asks specific questions about products/services - Mentions current projects with timelines - Asks about pricing or delivery options - Wants to schedule callbacks or meetings - Provides detailed project information

Medium Interest Indicators: - General interest in services - Asks about capabilities - Wants information for future reference - Mentions potential upcoming projects - Asks to be contacted later

Low Interest Indicators: - Polite but not engaged - Already has established suppliers - No current or planned projects - Just being courteous - Clear “not interested” response

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## LEAD SCORING & OUTCOMES

High-Priority Leads: - Decision maker identified - Current project with timeline - Specific requirements mentioned - Budget authority confirmed - Wants immediate follow-up

Medium-Priority Leads: - Influences purchasing decisions - Future projects planned - General interest expressed - Wants information for consideration - Scheduled follow-up requested

Low-Priority Leads: - Not decision maker - No clear projects planned - General information request only - Long-term future interest - Referral to correct contact

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## QUALIFICATION OUTCOMES

Immediate Action Required: - “Interested” → Sales callback arranged - “Quote needed” → RFQ created during call OR WhatsApp/email sent for requirements - “Hot prospect” → Transfer to sales team immediately - “Emergency need” → Transfer to emergency supply team

Future Pipeline: - “Not now” → Future project timeline identified, follow-up scheduled - “Future interest” → Scheduled callback in specified timeframe - “Information request” → Send information pack and schedule follow-up

Administrative: - “Wrong person” → Correct contact identified - “Not relevant” → Polite close and remove from list - “Do not call” → Respect request and update records

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## FOLLOW-UP PREFERENCES

Offer Options: “Would you prefer we call or email you the quote?” “Is there a good time for a rep to check in?” “Best way to reach you - call, email, or WhatsApp?”

Contact Method Confirmation: - Preferred communication method - Best contact times - Specific contact person - Alternative contact options

Information to Capture: - Contact name and title - Company name and type - Project details and timeline - Specific requirements mentioned - Decision-making process - Preferred contact method - Best contact times - Interest level and priority

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## RFQ HANDOFF PROCESS

Complete RFQ Creation: - Agent gathers all requirements during call - Ask: "Is there anything else you'd like to add to the quote?" - Agent creates ready-made RFQ on customer's behalf - Agent messages sales rep about incoming RFQ - Sales rep picks up from there with actual quote

Internal Communication: - Log outcome accurately - Update customer database - Schedule follow-up actions - Note any special instructions - Ensure seamless handoff to sales team

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## QUALIFICATION SUCCESS METRICS

Quality Indicators: - Complete contact information gathered - Decision-maker status confirmed - Project timeline established - Delivery requirements understood - Appropriate follow-up arranged

Conversion Potential: - High: Immediate project with timeline - Medium: Future project planned - Low: General interest only

Follow-up Actions Required: - Immediate: Sales callback/quote - Scheduled: Future contact date - Information: Send details only

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RELATED FILES: - See nds-conversation-flows.txt to trigger RFQ flow - See nds-delivery-terms.txt for cutoff and delivery timing - See nds-personas.txt for tailoring questions to caller type - See nds-compliance-rules.txt for technical question boundaries

This framework helps agents gather essential information efficiently while maintaining professional conversation flow.