

TEMPLATE 6: LEAD QUALIFICATION

File: `{COMPANY_SLUG}_qualification.md`

PURPOSE: Provide framework for gathering essential lead information and determining follow-up actions.

Lead Qualification Framework

Essential Information to Gather

Project Context

- **Project Type:** {PROJECT_TYPE_EXAMPLES}
- **Timeline:** {TIMELINE_QUESTIONS}
- **Scope:** {SCOPE_INDICATORS}
- **Decision Timeline:** {DECISION_TIMING}

Customer Profile

- **Company Type:** {COMPANY_TYPE_CATEGORIES}
- **Size Indicators:** {SIZE_INDICATORS}
- **Geographic Location:** {LOCATION_IMPORTANCE}
- **Industry Sector:** {SECTOR_RELEVANCE}

Decision Process

- **Decision Maker Status:** {DECISION_MAKER_INDICATORS}
- **Approval Process:** {APPROVAL_PROCESS_QUESTIONS}
- **Budget Authority:** {BUDGET_INDICATORS}
- **Influencers:** {INFLUENCER_IDENTIFICATION}

Current Situation

- **Existing Suppliers:** {SUPPLIER_QUESTIONS}
- **Pain Points:** {PAIN_POINT_INDICATORS}
- **Urgency Level:** {URGENCY_SIGNS}
- **Purchase History:** {PURCHASE_PATTERNS}

Qualification Outcomes

High-Priority Leads

Characteristics: {HIGH_PRIORITY_TRAITS} **Follow-up Action:** {HIGH_PRIORITY_ACTIONS} **Timeline:** {HIGH_PRIORITY_TIMELINE}

Medium-Priority Leads

Characteristics: {MEDIUM_PRIORITY_TRAITS} **Follow-up Action:** {MEDIUM_PRIORITY_ACTIONS} **Timeline:** {MEDIUM_PRIORITY_TIMELINE}

Low-Priority Leads

Characteristics: {LOW_PRIORITY_TRAITS} **Follow-up Action:** {LOW_PRIORITY_ACTIONS} **Timeline:** {LOW_PRIORITY_TIMELINE}

Follow-up Preferences

Contact Methods

- **Phone:** {PHONE_SCENARIOS}
- **Email:** {EMAIL_SCENARIOS}
- **{CONTACT_METHOD_3}:** {METHOD_3_SCENARIOS}

Information Delivery

- **Immediate:** {IMMEDIATE_INFO_TYPES}
- **Scheduled:** {SCHEDULED_INFO_TYPES}
- **On-Demand:** {ON_DEMAND_INFO_TYPES}

CRM Integration

- **Lead Scoring:** {LEAD_SCORING_CRITERIA}
- **Categorization:** {CATEGORIZATION_SYSTEM}
- **Next Steps:** {NEXT_STEP_OPTIONS}
- **Handoff Process:** {HANDOFF_PROCEDURES}

PLACEHOLDER FILLING GUIDE:

Placeholder	Description	Example
{PROJECT_TYPE_EXAMPLES}	Types of projects customers work on	"Residential construction, commercial buildings, infrastructure projects"
{TIMELINE_QUESTIONS}	Questions about project timing	"When do you need materials on site? What's your project timeline?"
{SCOPE_INDICATORS}	Project size indicators	"Number of units, square footage, duration of project"
{DECISION_TIMING}	When decisions are made	"How soon do you need to make supplier decisions?"
{COMPANY_TYPE_CATEGORIES}	Types of companies	"General contractors, specialty contractors, developers, homeowners"
{SIZE_INDICATORS}	Company size indicators	"Annual revenue, number of employees, project volume"
{LOCATION_IMPORTANCE}	Why location matters	"Delivery coverage, local market knowledge, service capabilities"
{SECTOR_RELEVANCE}	Industry relevance	"Residential, commercial, industrial, infrastructure"
{DECISION_MAKER_INDICATORS}	Signs of decision authority	"Job title, purchasing authority, mentions of approval needs"
{APPROVAL_PROCESS_QUESTIONS}	Questions about approvals	"Who else is involved in supplier decisions?"
{BUDGET_INDICATORS}	Budget authority signs	"References to budget approval, cost concerns, price sensitivity"
{INFLUENCER_IDENTIFICATION}	Who influences decisions	"Engineers, project managers, procurement teams"
{SUPPLIER_QUESTIONS}	Questions about current suppliers	"Who do you currently use? Are you happy with them?"
{PAIN_POINT_INDICATORS}	Signs of problems	"Complaints about delivery, quality issues, service problems"
{URGENCY_SIGNS}	Indicators of urgency	"Immediate need, tight deadlines, emergency situations"
{PURCHASE_PATTERNS}	Buying behavior	"Regular orders, seasonal patterns, project-based purchasing"
{HIGH_PRIORITY_TRAITS}	Top priority characteristics	"Immediate need, decision maker, specific timeline, budget approved"
{HIGH_PRIORITY_ACTIONS}	Actions for top leads	"Immediate sales team callback, quote preparation, technical consultation"
{HIGH_PRIORITY_TIMELINE}	Follow-up timing	"Within 24 hours, same day if possible"

Placeholder	Description	Example
{MEDIUM_PRIORITY_TRAITS}	Medium priority characteristics	"Future project, influences decisions, exploring options"
{MEDIUM_PRIORITY_ACTIONS}	Actions for medium leads	"Information packet, scheduled follow-up, relationship building"
{MEDIUM_PRIORITY_TIMELINE}	Follow-up timing	"Within 1 week, scheduled callback"
{LOW_PRIORITY_TRAITS}	Lower priority characteristics	"No immediate need, not decision maker, information gathering only"
{LOW_PRIORITY_ACTIONS}	Actions for low leads	"Add to newsletter, long-term follow-up schedule"
{LOW_PRIORITY_TIMELINE}	Follow-up timing	"Quarterly check-ins, as appropriate"
{PHONE_SCENARIOS}	When to use phone follow-up	"Urgent needs, complex requirements, established relationships"
{EMAIL_SCENARIOS}	When to use email follow-up	"Information requests, quote delivery, documentation"
{CONTACT_METHOD_3}	Third contact method	"WhatsApp/SMS"
{METHOD_3_SCENARIOS}	When to use third method	"Quick updates, delivery notifications, urgent communications"
{IMMEDIATE_INFO_TYPES}	What to send immediately	"Company overview, basic product specs, contact information"
{SCHEDULED_INFO_TYPES}	What to send on schedule	"Detailed quotes, project-specific information"
{ON_DEMAND_INFO_TYPES}	What to send when requested	"Technical specifications, case studies, references"
{LEAD_SCORING_CRITERIA}	How to score leads	"Need + Authority + Timeline + Budget"
{CATEGORIZATION_SYSTEM}	How to categorize leads	"Hot/Warm/Cold, Industry sector, Company size"
{NEXT_STEP_OPTIONS}	Possible next steps	"Sales callback, quote, information packet, technical consultation"
{HANDOFF_PROCEDURES}	How to transfer leads	"Sales team notification, CRM update, appointment scheduling"

QUALITY CHECKLIST:

- ☐ All placeholders replaced with business-relevant qualification criteria
- ☐ Questions focus on gathering information, not leading conversations
- ☐ Qualification outcomes reflect actual follow-up capabilities
- ☐ Lead scoring aligns with business priorities

- ☐ Follow-up preferences match available resources
- ☐ CRM integration matches actual systems and processes