

Lead Qualification Checklist

(Nexa-BANT Framework)

Document ID: SAL-QUAL-2025.01

Version: 1.0

Effective Date: 2025-11-01

Department: Sales Development, Sales Operations

MQL to SQL Transition Guide

This checklist must be completed by the SDR before formally passing an MQL (Marketing Qualified Lead) to an AE (Account Executive). All checks must be logged in the CRM notes.

1. Fit Assessment (Is this the right company?)

Criteria	Status	Notes / Verification
Company Size	[Y/N]	Annual Revenue > \$500M or Employee Count > 1,000?
Industry Fit	[Y/N]	Is the business regulated or does it rely on high-volume, repetitive data workflows?
Geographic Fit	[Y/N]	Headquartered in a supported territory (MENA, APAC focus)?

2. Nexa-BANT (Qualification Deep-Dive)

We use an adapted BANT (Budget, Authority, Need, Timeline) framework focused on AI value.

Criteria	Question Focus	Minimum Requirement for SQL
Budget (B)	"Do you currently allocate budget to Digital Transformation initiatives or process automation?"	A clear budget line item exists for "Software/Automation," even if uncommitted.

Authority (A)	"Who is the primary economic decision-maker for this AI project, and who signs the PO?"	Access has been granted to the Decision Maker (VP/C-Level) or a clear path to them is defined.
Need & Value (N)	"If we solved [Pain Point], what is the annual financial impact on your P&L?"	Client quantifies the pain: must be a high-priority, 7-figure problem that NexaCore can address.
Timeline (T)	"When must this automation project be fully operational to meet internal mandates?"	Deployment required within the next 6-9 months . Not "Someday" or "Next year."

3. Competitor and Procurement

Criteria	Status	Notes / Verification
Current Vendor	[Y/N]	Is a legacy/competitor solution currently in place? (If Yes, why are they looking to change?)
Procurement Process	[Defined/Vague]	Is the client's internal procurement or legal process mapped out? (Needed before Stage 3).

SDR Certification: I verify that all criteria above have been met or addressed, and this lead is ready for an AE.

Date & Signature: [SDR Name] on [Date]