LEAD QUALIFICATION EVALUATION FORM

Use for leads and prospects that fit your customer profiles/target markets to determine qualification levels.

**Lead Name:** [lead name]

**Lead Generated:** [date generated

**Lead Source:** [where the lead was generated from]

# BANT Analysis (check one box for each category)

Budget-*Ask about desired spending or any budget constraints*

* Lead’s budget/spending capabilities are too far outside our pricing
* Lead’s budget/spending capabilities are slightly outside our pricing
* Lead’s budget/spending capabilities are within our pricing

Authority-*Ask if they are the decision-maker and/or if any other people should be involved*

* Lead contact is not a decision-maker and has no influence on these purchase decisions
* Lead contact is not a decision-maker but has some influence on this purchase decision
* Lead contact is one of a few decision-makers for this purchase decision
* Lead contact is the sole decision-maker for this purchase decision

Needs-*Ask if they have a current provider, what they like and dislike about them, and if they are actively seeking new options*

* Lead currently has a provider for this solution and is not looking to change
* Lead does not have a provider for this solution but is not actively looking for one
* Lead currently has a provider for this solution but is looking for a new one
* Lead does not have a provider for this solution and is actively looking for one

Timeline-*Ask about the estimated timeline they’re looking to implement your product or service*

* Lead is unsure if and when they want to implement this solution
* Lead wants to implement this solution in six months to a year
* Lead wants to implement this solution in three to six months
* Lead wants to implement this solution in less than three months

# Lead Scoring (showing interest)

Marketing Qualifying Events

* [Marketing qualifying action (clicking link, downloading an asset, etc)]: [Points]
* [Marketing qualifying action (clicking link, downloading an asset, etc)]: [Points]
* [Marketing qualifying action (clicking link, downloading an asset, etc)]: [Points]

# Total Marketing Qualifying Points: [Points]

Sales Qualifying Events

* [Sales qualifying action (positive sales conversation, requests pricing, agreed to presentation, etc)]: [Points]
* [Sales qualifying action (positive sales conversation, requests pricing, agreed to presentation, etc)]: [Points]
* [Sales qualifying action (positive sales conversation, requests pricing, agreed to presentation, etc)]: [Points]

**Total Sales Qualifying Points: [Points]**

**Total Lead Score: [Total Score] BANT Analysis: [Great, Good, Moderate, Poor]**