

 SALES LEAD QUALIFICATION (SAMPLE)

1 Enter prospect details

Assignees:

Process Starter

Deadline:

1 day after a process is launched

First name (Required)

Last name (Required)

Phone number (Required)

Email (Required)

Company name (Required)

Industry

- Accounting
- Apparel/Fashion
- Architecture
- Arts/Crafts
- Automotive
- Aviation/Aerospace
- Banking/Mortgage
- Biotechnology/Green Tech
- Computer Software
- Construction
- Design
- Education
- Entertainment Events Services
- Facilities Services
- Farming
- Financial Services
- Food Production
- Government
- Graphic Design/Web Design
- Health/Fitness
- Hedge Fund/Private Equity
- Hospital/Health Care
- Hospitality
- Human Resources/HR
- Information Technology/IT
- Insurance
- Internet
- Legal Services
- Management Consulting
- Manufacturing
- Marketing/Advertising/Sales
- Media Production
- Medical
- Mining Music
- Non-Profit/Volunteering
- Oil/Energy
- Outsourcing/Offshoring
- Pharmaceuticals
- Professional Services
- Real Estate/Mortgage
- Religious Institutions
- Restaurants
- Retail

- Security/Investigations
- Sports
- Startup (Technology)
- Telecommunications
- Transportation
- Utilities
- Venture Capital/VC
- Writing/Editing
- Other

If 'Other', please describe below

Use case / Requirement (Required)

2  **Qualify prospect**

Assignees:
Process Starter

Deadline:
1 day after a process is launched

Select criteria application to the prospect**(Must meet all criteria to qualify for a sales call)**

- Prospect is an incorporated company
- Prospect has 1 office based in the USA
- Prospect has >10 employees

What is the deal size? (Required)

- <=1000
 - >1000
-

3  Does not qualify - Refer to partners**Assignees:**

Process Starter

Deadline:

1 day after a process is launched

Please send a reply sharing a list of partner companies and close.

What is the annual contract value?

4  Prospect qualifies - Call prospect**Assignees:**

Process Starter

Deadline:

1 day after a process is launched

Prospect Details:

Name: **[First name]** **[Last name]**Company Name: **[Company name]**Phone: **[Phone number]**Requirement: **[Use case / Requirement]**Deal Size: **[What is the deal size?]**
