Checklist: B2B Lead Qualification

Evaluate quality and readiness of business leads



A practical checklist designed to help entrepreneurs who **dreamBIG** and want to quickly assess the **quality, seriousness, and readiness** of B2B leads ensuring time and effort are focused on the **right prospects** and sales efforts convert faster.

How to Use This Checklist

- Use it while researching prospects and/or immediately after the first call or meeting
- Tick all statements that apply

Leads with more ticks indicate **higher priority** and stronger need for your product or service

1. Company Fit

☐ The company operates in our target industry
☐ Company size matches our Ideal Customer Profile (ICP)
☐ Business model aligns with our offering
☐ Location/market is serviceable
☐ Lead has explored or compared similar products/services online or via social media

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2. Decision-Maker Access

☐ Speaking with the owner / founder / key decision-maker
☐ Decision-maker is actively involved in discussions
☐ Buying authority is clearly defined
☐ Approval process is understood
☐ Decision timelines are communicated

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3. Problem & Need Clarity

☐ A clear business problem is identified
☐ The problem is urgent or time-bound
☐ Impact of the problem is measurable (cost, revenue, efficiency, geography, target group)
☐ Lead is actively seeking a solution
☐ Success metrics and need parameters for your product/service are clearly defined

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4. Budget Readiness

☐ Budget is allocated or planned
☐ pricing expectations are realistic
☐ ROI and value matter more than the lowest price
☐ No major budget blockers identified
☐ Budget priorities align with the usefulness of your product/service

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5. Timeline & Priority

☐ Expected decision timeline is defined
☐ Internal urgency exists
☐ Project start date discussed / in-principle acceptance received
☐ Risks of delay are understood

☐ Scope of deliverables and timelines are clearly defined and mutually agreed

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6. Solution Fit

☐ Our solution clearly addresses the stated problem
☐ Minimal customization is required
☐ Competitive alternatives are discussed openly
☐ Unique value proposition is clearly communicated
☐ Ownership, assumptions, support needs, and out-of-scope items are clearly outlined

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7. Engagement Signals

☐ Responds promptly to calls and emails
☐ Asks relevant and meaningful questions
☐ Shares required information willingly
☐ Requests proposal, demo, or next steps
☐ Clearly communicates expectations and priorities related to your product/service

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Risk Flags

(If multiple boxes are checked, proceed cautiously)
☐ Conversations focused only on price
☐ No clear decision-maker involved or no committed decision timeline
☐ vague problem definition or unclear scope and expectations
☐ Repeated delays without valid reasons

Lead Qualification Summary

- **Total Yes (✓): ___** / 35

Lead Status:
☐ Hot – Ready to close
☐ Warm – Nurture and follow up
☐ Cold – Low priority

Lost (if applicable): Reason:_____

Entrepreneur Tip

Disqualifying early is just as important as closing. Sustainable sales growth comes from focusing on **right-fit clients** whose needs align with the usability and value of your products or services not from pursuing every inquiry.

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