Strategic Opportunity Qualification

1. Customer Need and Strategic Fit

☐ The client problem, risk, or strategic priority is clearly understood

☐ The customer recognises the issue and has expressed a need to act

☐ The opportunity aligns with our firm's core expertise and capabilities

☐ The potential engagement supports the client's strategic goals

☐ The client has acknowledged the potential value or impact of the solution

2. Stakeholder Access and Decision Authority

☐ A senior decision maker has been identified

☐ At least one meeting has been held with a senior-level stakeholder

☐ Key influencers and technical stakeholders are known

☐ Stakeholder map has been created and documented in CRM

☐ Internal sponsor or advocate within the organisation has been identified

3. Budget and Commercial Reality

☐ Budget range has been discussed or indicated

☐ Client has confirmed funding authority or budget approval process

☐ Commercial expectations are broadly aligned

☐ Procurement or commercial approval processes are understood

☐ Pricing model (day rate, project fee, retainer, etc.) has been discussed

4. Solution Development and Value Proposition

☐ Discovery discussions have identified the client's key objectives

☐ Success criteria and expected outcomes have been discussed

☐ Proposed approach or engagement structure has been outlined

☐ Value proposition is clearly linked to the client's business problem

☐ Internal team alignment on delivery capability and resources

5. Competition and Differentiation

☐ Known competitors or alternative options identified

☐ Client's evaluation criteria understood

☐ Our differentiators are clearly articulated and evidenced

☐ Competitor strengths and weaknesses understood

☐ Client feedback gathered on perceived strengths and concerns

6. Commercial Progress and Next Steps

☐ A formal proposal or solution outline has been presented

☐ Pricing and commercial terms have been discussed

☐ Client concerns, objections, or risks have been surfaced

☐ Feedback on the proposal has been obtained

☐ Implementation timeline or project start discussed

☐ Next meeting or decision milestone scheduled

Opportunity Qualification Score

Score	**Interpretation**
5–6 sections confirmed	Strong opportunity – credible pipeline
3–4 sections confirmed	Moderate opportunity – needs development
1–2 sections confirmed	Weak opportunity – likely pipeline inflation

Final Leadership Question

"What objective evidence proves this opportunity will progress?"

Strong opportunities always demonstrate:

1. access to decision makers
2. clear business problem
3. credible budget
4. competitive positioning

• defined next steps

Without these elements, the opportunity is **not yet qualified**.