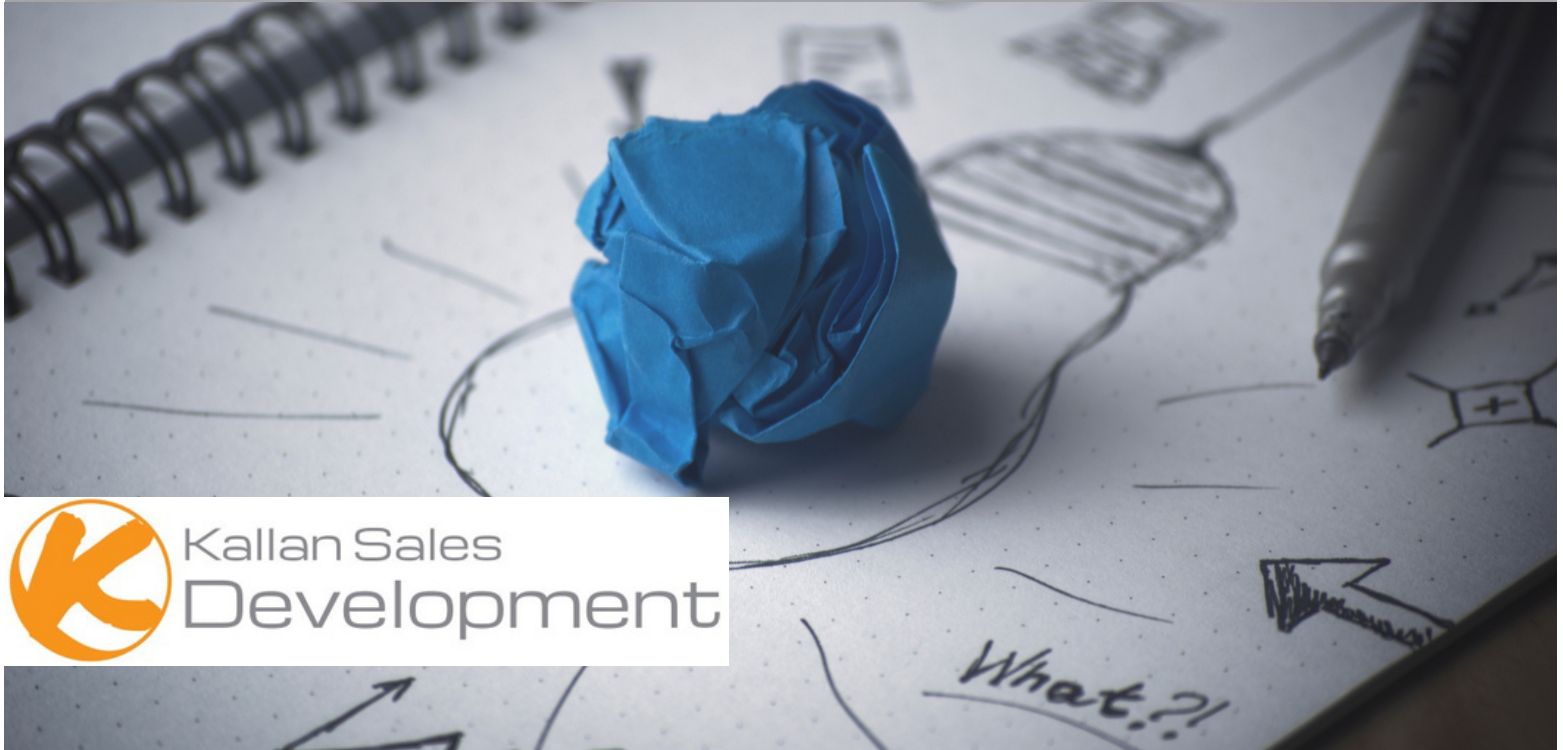


DEVELOPING A LEAD QUALIFICATION FRAMEWORK



The Importance of Lead Qualification

After getting your teams [aligned around unified objectives](#) clear guidance should be given relative to what qualifies as a lead. A common understanding of the criteria that identifies not only the stage of the lead, but its quality, should be known as well.

This is important because to drive reduced friction between both teams marketing must provide leads that sales can close. They must also properly nurture the ones that are not yet ready for sales engagement with relevant content consistent with the buying stage the prospect is in to keep them interested, but not feel overwhelmed. The shared understanding also provides the rules of engagement for both team to minimize conflict that can be generated if sales continues to reject leads based on the "feeling" that it is not a good lead, or marketing feeling like the leads they are providing are not properly being converted. Both of these are valid concerns because they directly impact the measurables set for each stakeholder in the [service level agreement](#).

Does your sales and marketing team have a shared understanding of what a qualified lead is?



Another important point to mention is the transition between marketing's nurturing of the lead and sales initiating engagement. This hand-off must appear seamless to the prospect and timed in a manner such that marketing's engagement does not overshadow the value of sales, resulting in the lead questioning why they even need to talk to sales or in some cases re-explain their needs. Generally it will be frustrating for your prospects, and it can impact the ability for sales to properly navigate through the sales cycle once an opportunity has been created.

Defining Your Qualification Criteria

Two foundational components to base your structure on are a clearly mapped out guideline defining a leads fit for the service or product your organization offers and how ready they are to advance in the buying journey.

We start with identifying your ideal customer profile. This is a set of criteria such as regional demographics, annual revenue, company size or industry served that a lead must meet in order to be a successful customer. Do your current leads meet your requirements?

Next are the actions that determine when someone is sales ready. You may have a great fit that is not ready for sales engagement but if you wait too long to engage you might miss the opportunity.

During the process of creating your ideal customer profile you will have no doubt uncovered indicators within your sales process which will give you the ability to evaluate readiness to buy. As part of the advancement criteria, which allows each lead to move to the next stage, decisions are made and actions are taken that help to highlight the progression toward a buying decision. By understanding these incremental movements that drive deal advancement, and being aware of when they take place, you can use this to outline a framework that will determine when someone is ready for sales engagement or when they need additional nurturing from marketing.

Once you have taken the steps to define your ideal customer, and have outlined the sequence that identifies sales readiness, it is now time to establish when a lead gets transferred from marketing to sales. To start this we must first understand the difference between a marketing qualified lead (MQL) and a sales qualified lead (SQL). While these definitions can vary among different organization's they generally follow along a similar foundational meaning.

Tip: Start this process by defining where your business strengths are and review your pipeline history to see what type of opportunities you are the most successful in winning.

MQL: A potential customer that marketing identified, or that actively engaged directly to express interest, which also meets the qualification criteria of a good fit lead.

SQL: A potential customer that meets the established qualification criteria, has expressed enough interest and is ready to talk to sales.



Developing Your Qualification Matrix

After both sales and marketing have been brought to agreement on these terms a simple matrix can be created based on good fit versus bad fit, and sales ready versus not sales ready.

It is worth noting, that even if an incoming lead appears to be a bad fit initially there is value in doing research to verify the inquiry. In some cases it could be a good lead in with a desired target account but the specific opportunity is not right or perhaps the lead is a division of an organization that does fit your ideal profile. Regardless of the situation, it is worth the 5 minutes to research as there may be a strategic reason to look at an opportunity that would otherwise not be of interest.

Now that you have identified the type of leads that will most likely convert to a successful sales opportunity and created a framework to manage them internally, you are one step further in developing your overall [sales enablement strategy](#).

		Sales Readiness	
		Ready	Not Ready
Lead Fit	Good Fit	Sales	Marketing
	Bad Fit	Sales	Marketing

Need help defining the steps that indicate your prospects readiness to buy?



[Kallan Sales Development](#) helps small to medium-sized business create scalable enablement solutions that define how opportunities flow within the organization by implementing a structured sales process and [pipeline development tools](#) that drive sales velocity.

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Contact us today to discuss your sales enablement goals.