



SALES AND FINANCE

Lead qualification scorecard

A scorecard for deciding whether a prospective client is a good fit before your team spends time scoping the work.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

Your pipeline is busy but not every opportunity deserves the same attention.

WORK THROUGH THE CHECKLIST

- ☐ 01 **Check problem fit**

- ☐ 02 **Check budget range**

- ☐ 03 **Check timeline realism**

- ☐ 04 **Identify decision maker**

- ☐ 05 **Assess working fit**

- ☐ 06 **Choose pursue, nurture, or decline**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.

This practical workflow resource is not legal, financial, tax, or security advice. Adapt it to your team and circumstances.