How to Qualify Leads for Sales

We've all been there: stuck in endless sales cycles that start with a flood of leads until trickling down into a few actual sales. Without a structured lead qualification process, it's easy to lose focus, waste resources, and miss out on high-potential opportunities.

Efficient sales teams know the secret: they qualify each lead to prioritize sales follow-ups and streamline their efforts, ensuring time and energy are spent where it matters most. So, how do they do it?

Let's break down the steps.

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Lead Qualification Frameworks

CHECKLIST

How to Qualify Leads for Sales

◯ Build Your Ideal Customer Profile (ICP) to Determine Lead Qualifiers

A perfectly qualified lead at one organization might be a terrible match for another. Qualifying leads accurately requires you to sit down with all relevant stakeholders and define your ideal customer profile (ICP).

Describe exactly who can benefit most from your product or solution. What size is their company? How long have they been in business? What are their main obstacles? What do their cashflows and employee structures look like? Build out every last detail so that you can reverse engineer a go-to rubric to qualify future leads.

◯ Set Up Your Lead Scoring

With the details and features of your ICP crystal clear, you're ready to set up a lead scoring system. Depending on your current practices for managing lead data and analyzing buyer behaviors, you might opt for predictive lead scoring or rule-based lead scoring.

Predictive Lead Scoring

A predictive lead scoring approach means you're using data analytics to anticipate the likelihood of a lead converting into a buyer based on historical patterns. If your sales team already uses a CRM with AI and data analytics capabilities, you may be able to leverage predictive lead scoring features.
The more data you have on your ICP, the more accurate predictive lead scoring becomes.

Rule-based Lead Scoring

In rule-based lead scoring, sales experts assign scores to each lead in every category. Depending on your ICP criteria, you might have binary scoring sections with yes or no answers, or you might use a tool like a rubric to "grade" each lead according to how well they meet the criteria.

If you go this route, define the number of "yes" answers or the minimum "grade" needed to be considered a qualified lead. From there, sales experts can reference the rubric or scorecard to determine whether each lead falls within your pre-defined parameters for a qualified lead.

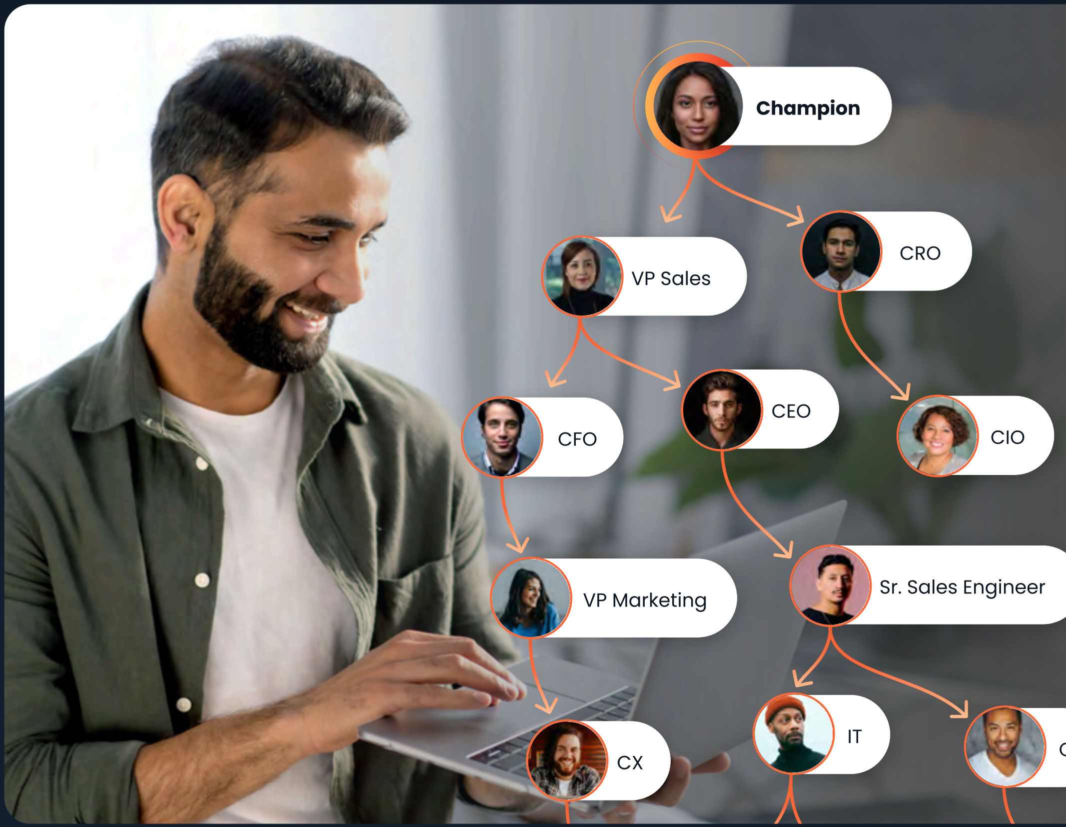
Evaluate Your Buyers

Use your framework and lead scoring to evaluate your buyers at every stage of the buyer journey. At a minimum, sales experts should evaluate every buyer they speak to on a sales call or demo.

Over time, you might consider building out rubrics for earlier stages of the buyer journey to make the best possible use of your team resources. For example, prospects can qualify themselves using tools like demo automation, which allows buyers to learn about your product before they even have a chance to book a sales call.

Review and Refine Your New Lead Data

Return to your new lead data on a monthly or quarterly basis to refine your lead qualification process. A responsive approach to lead qualifying gives you the power to fine-tune your scoring technique and create the most accurate, high-converting, qualified lead list possible.



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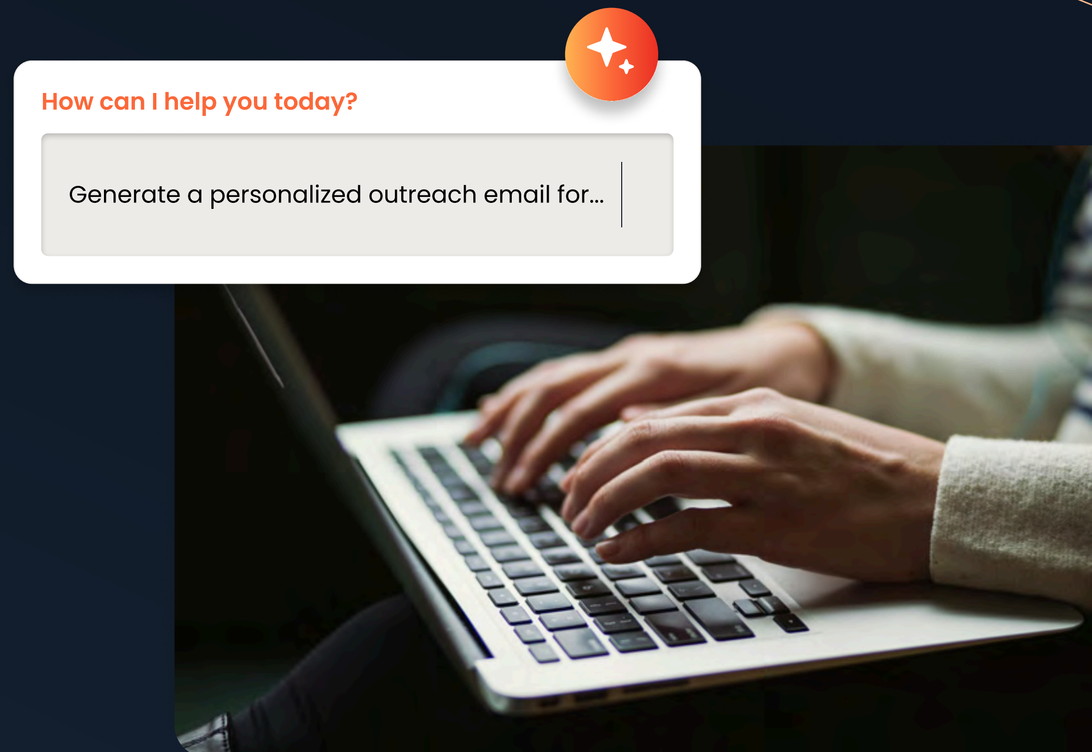
Where to Automate the Lead Qualification Process



Outreach

The top of your lead funnel is the largest and the least qualified. Whether you work in cold outreach or you reach out to warm marketing leads, the truth is that you're going to reach leads who aren't a good fit. It's the nature of the game—but you don't have to let it eat away at your sales team's bandwidth.

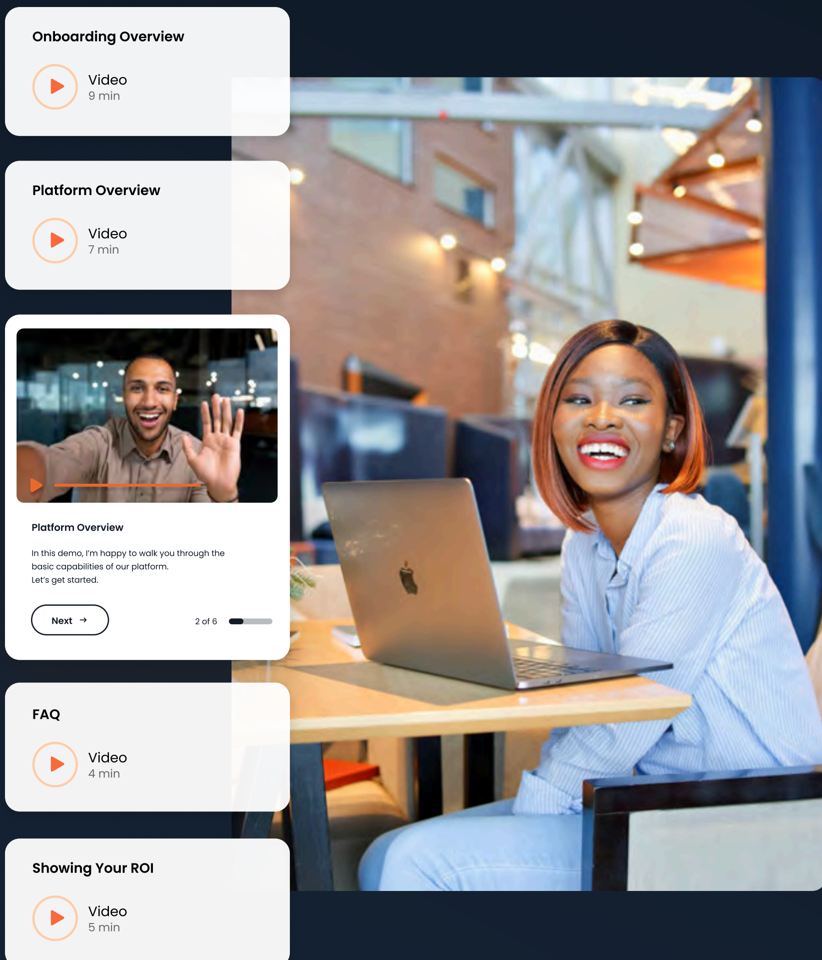
Email automation and AI-generated messaging can help take the heavy lifting out of initial outreach. Not only does automating outreach free up sales experts' time for more targeted sales efforts, but it also allows you to reach potential buyers at a scalable volume.

Demos

Some sales team structures have sales experts on call after call, repeating the same information for countless different leads. In some ways, it makes sense: SaaS businesses have to educate their leads on their unique solution before they can expect conversion. But endless live demos are time-consuming and limit scalability. And with a new emphasis on buyer enablement, buyers want more flexibility to explore solutions on their own terms.

Fortunately, presales departments can acquire more qualified leads with an automated demo process that delivers a deeply personalized and interactive experience for buyers without having to rely solely on live meetings. With automated demo platforms like Consensus, sales teams can send demos for leads to watch on their own time.

Consensus allows leads to share your demo within their organization to help you reach the exact right stakeholders. You can even track lead activity within your virtual tours and product demos. Later on, you can use that activity data to help qualify those leads and determine the best path for follow-up.



Lead Scoring

To automate lead scoring, you can use tools like Zapier, built-in features within their CRM, or dedicated AI and scoring algorithms. Once you program the correct parameters, your automation can score and filter your leads to leave you with the most qualified buyers.

Follow-up

Sending follow-up messages gets repetitive and overly time-consuming very quickly. Consistency is key in follow-up strategy and automations can achieve more consistency than even the best human teams. Use your CRM or sales engagement software to automate your follow-ups, whether that means configuring email sequences, scheduling reminders for calls in your calendar, or sending additional personalized demos.

Platforms like Consensus take this further by enabling automated demo follow-ups—letting buyers revisit demos at their convenience while keeping your product top of mind.

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Lead Qualification Frameworks

The most successful sales and marketing teams focus on data and repeatable processes. Instead of relying on one-off feelings about a given lead, use a lead qualification framework to systematically qualify leads.

BANT

The BANT framework focuses on the four characteristics of a qualified lead:

- **Budget**
  Can they afford your solution?
- **Authority**
  Do they hold the power within their organization to sign on with you?
- **Need**
  Are they just shopping around, or does your product solve an immediate problem for them?
- **Timeline**
  When will the lead be ready to buy?

This framework is common for high-ticket B2B solutions and works best for leads who are quite far down the pipeline. If you're implementing BANT, you've likely already invested time into nurturing and following up with the lead.

MEDDIC

For lower volume but higher value sales, the MEDDIC framework can create a more in-depth understanding of leads. MEDDIC stands for:

- **Metrics**
  What numbers will your lead expect to see as a result of your product?
- **Economic buyer**
  Who is the ultimate decision maker?
- **Decision criteria**
  What specific aspects is the buyer looking for?
- **Decision process**
  How will the buyer make their decision?
- **Pain point identification**
  What problem is the buyer trying to solve?
- **Champion**
  Is there someone within the buyer's company who already appreciates your product and can speak on its behalf?

MEDDIC gives a thorough analysis of the likelihood of turning a lead into a buyer. It requires a deep conversation between your sales experts and your buyers to identify where they stand on each of these overlapping metrics.

CHAMP

CHAMP involves similar elements to BANT but prioritizes them in a new order with a focus on the lead's main challenges. CHAMP stands for:

- **Challenge**
  What urgent problems is the lead facing?
- **Authority**
  Who is the decision maker?
- **Money**
  What is the budget for solving this problem?
- **Prioritization**
  How soon are they hoping to solve this problem?

The CHAMP framework offers a compelling simplicity, yet your sales team will still need to reach a high level of familiarity with your buyer to fully understand each of these factors. Many buyers won't immediately divulge how urgently they need your solution, but high-quality sales experts can sift through conversational details to accurately use this framework.

High-volume, low-ticket sales are not a good fit for CHAMP since it requires deep analysis and a long conversation with the buyer.

ANUM

If your sales process hinges most on the authority of the lead to make decisions within their organization, the ANUM framework may be your best match. Its elements are very similar to BANT and CHAMP, but the order differs to give more weight to authority. ANUM stands for:

- **Authority**

  Who is making the decisions at their company?
- **Need**

  How big of a problem can you solve with your product?
- **Urgency**

  How quickly do they need that problem solved?
- **Money**

  Can they afford your product?

FAINT

FAINT can help you determine the level of interest a lead has in your solution is integral to your next steps as a sales team. FAINT stands for:

- **Funds**

  Do they have money available to purchase your solution?
- **Authority**

  Who has the final call concerning how they solve their problem?
- **Interest**

  How interested are they in your specific solution to their problem?
- **Need**

  What problem can you solve for them, and how important is that problem?

Timing: When do they want that problem solved, and when can they implement your product into their business?

GPCTBA/C&I

Need an even more thorough look into your leads' goals and internal challenges? For sales teams that have the bandwidth to do some major digging, the GPCTBA/C&I framework leaves you well-equipped to accurately qualify leads and determine the best strategy for moving forward in the sales process.

GPCTBA/C&I stands for:

- **Goals**

  What do they hope to achieve in the short and long term?
- **Plans**

  Do they know how they'll achieve those goals?
- **Challenges**

  What's standing in the way of their goals?
- **Timeline**

  When do they need to meet those goals?
- **Budget**

  How much money can they invest in achieving their goals?
- **Authority**

  Do they have the power to decide how they reach their goals?
- **Consequences & Implications**

  What would happen if they achieved their goal–or didn't?

Generate More (and Better) Qualified Leads

To qualify leads on autopilot, use Consensus to send automated demos and personalized virtual tours.

With Consensus, buyers can walk themselves through your solution before getting on your sales team's calendars. Your GTM teams can unlock knowledge about your leads before your first call while your buyers can self-educate on the impact of your product.

Learn more about Consensus →