

# LEAD QUALIFICATION FRAMEWORK

## Outbound Sales Campaign – WhatsApp Automation Client

Managed by Business Drive Corporation

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### 1. Purpose of This Framework

This Lead Qualification Framework defines the **mandatory qualification standards** that must be met before any lead is marked as *Qualified* or before a demo is scheduled.

The objective of this framework is to:

- Ensure only **high-intent, relevant prospects** move forward
- Improve demo attendance and conversion rates
- Reduce wasted sales team time
- Maintain consistent qualification across all call center partners

All agents and supervisors must strictly follow this framework.

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### 2. What Is a “Qualified Lead”?

A **qualified lead** is a business prospect that:

- Has a clear business use case for WhatsApp automation
- Has authority or access to the decision-maker
- Has a realistic budget or intent to invest
- Expresses willingness to attend a demo
- Is actively exploring or open to automation solutions

If any **critical qualification factor** is missing, the lead must **not** be marked as qualified.

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### 3. Qualification Pillars (Core Evaluation Areas)

Every lead must be evaluated across the following **six pillars**:

1. Business Profile
  2. WhatsApp Usage & Readiness
  3. Business Pain Points
  4. Budget & Investment Readiness
  5. Authority & Decision-Making Power
  6. Demo Intent & Availability
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### 4. Pillar 1: Business Profile Validation

#### Objective

To confirm that the prospect is a **legitimate, relevant business** aligned with the target market.

#### Mandatory Checks

Agents must validate:

- Business name and industry
- Company size (employees or monthly volume)
- Nature of customers (B2B / B2C / D2C)
- Digital presence (website, Google listing, social media)

#### Ideal Business Profiles

- SMEs and D2C brands
- Service-based businesses with recurring customer communication
- Businesses with inbound leads or customer support needs

#### Disqualification Signals

- ✗ Individual / personal usage
  - ✗ Non-operational or dormant businesses
  - ✗ No digital presence at all
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### 5. Pillar 2: WhatsApp Usage & Automation Readiness

## Objective

To assess whether WhatsApp is already used or can realistically be adopted as a customer communication channel.

## Key Questions Agents Must Ask

- Do you currently use WhatsApp to communicate with customers?
- Is WhatsApp used for sales, support, or follow-ups?
- How many customer messages do you handle per day/week?

## Qualification Signals

- ✓ Already using WhatsApp Business
- ✓ High volume of customer inquiries
- ✓ Interest in automation or broadcast messaging

## Disqualification Signals

- ✗ No interest in WhatsApp usage
  - ✗ Completely offline customer engagement
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# 6. Pillar 3: Business Pain Points & Need Identification

## Objective

To identify a **real, solvable business problem** that the platform can address.

## Key Pain Areas to Explore

- Manual replies consuming time
- Missed leads or delayed responses
- Poor follow-up or lead tracking
- No centralized customer communication
- Lack of reporting or analytics

## Qualification Criteria

A lead is qualified only if:

- The prospect clearly acknowledges a problem
- The problem aligns with automation use cases

- The prospect shows interest in solving it

## Red Flags

- ✗ “We don’t have any issue”
  - ✗ “Just browsing / checking prices”
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## 7. Pillar 4: Budget & Investment Readiness

### Objective

To ensure the prospect has **financial readiness** or serious intent.

### Budget Indicators

Agents must explore:

- Monthly marketing or CRM spend
- Past spending on tools or software
- Openness to investing in automation

### Qualification Threshold

- Indicative monthly budget of **₹10,000 or above**, or
- Clear intent to allocate budget post-demo

### Important Notes

- Agents must not quote prices
- Budget discussion must be exploratory, not aggressive

### Disqualification Signals

- ✗ No budget and no intent
  - ✗ Looking only for free tools
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## 8. Pillar 5: Authority & Decision-Making Power

### Objective

To ensure the demo is booked with a **decision-maker or influencer**.

### Acceptable Decision Roles

- Business Owner / Founder
- Marketing Head
- Operations Manager
- Authorized decision influencer

### Qualification Rule

- If speaking to a non-decision-maker, demo must be booked **only if** they confirm decision-maker participation.

### Red Flags

- ✗ Gatekeepers with no authority
  - ✗ “Just collecting information” with no escalation path
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## 9. Pillar 6: Demo Intent & Availability

### Objective

To confirm the prospect's **genuine willingness to attend a demo**.

### Mandatory Confirmation Points

- Prospect agrees to attend personally
- Date and time are confirmed
- Contact details are verified

### Qualification Signals

- ✓ Asks questions about demo
- ✓ Requests examples or use cases
- ✓ Confirms availability clearly

### Disqualification Signals

- ✗ “Send details, I’ll see later”
- ✗ No commitment to time

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## 10. Qualification Scoring Logic (Internal)

Each lead must satisfy:

- **All critical pillars (1, 2, 3, 5, 6)**
- Budget (Pillar 4) must show readiness or intent

Leads missing any critical pillar must be tagged as:

- Not Qualified
  - Follow-Up Required
  - Not Interested
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## 11. CRM Tagging Rules (Qualification-Based)

Qualification Outcome	CRM Status
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Fully Qualified	Demo Scheduled
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Partial Fit	Follow-Up
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No Fit	Not Qualified
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Explicit Rejection	Not Interested
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Incorrect tagging impacts QA scores and payouts.

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## 12. Common Qualification Mistakes to Avoid

- ❌ Booking demos just to meet targets
  - ❌ Skipping budget discussion
  - ❌ Ignoring authority validation
  - ❌ Assuming interest without confirmation
  - ❌ Poor or vague CRM notes
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## 13. Supervisor & QA Responsibilities

Supervisors must:

- Review qualified leads daily
- Listen to sample calls
- Reject incorrectly qualified demos
- Coach agents on gaps

Business Drive QA may override lead status if required.

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## 14. Re-Qualification & Follow-Up Rules

- Leads marked “Follow-Up” must be re-contacted within defined timelines
  - Re-qualification is mandatory before demo booking
  - Leads showing renewed intent can be upgraded
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## 15. Acknowledgement & Compliance

By executing this campaign, call center partners confirm:

- Full adherence to this qualification framework
- No compromise on lead quality
- Acceptance of QA-based validation

This framework is **mandatory and non-negotiable**.

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### Document Owner

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