



Worksheet 1: Establishing Lead Status Criteria

Directions: Discuss with your sales force and other pertinent colleagues the relative importance of each of the following factors. Next, determine how your answers impact the lead status.

1. Decision-making power of the respondent. How much power must the person have to be considered a “hot” lead? Is the person directly responsible for purchasing? Does the person have a significant amount of influence? Is the person part of the decision-making process at all? Determine a specific description of a responder’s decision-making power for each of the following:

Hot
Warm
Cold
Unknown
Dead

2. Time frame for purchase. What time frame makes the lead “hot”? Six weeks? Six months? At what point in the time frame does a lead become cold? Two years? Determine a specific time frame for each of the following:

Hot
Warm
Cold
Unknown
Dead

3. Level of need. What products (or services) is the respondent interested in, and what is the quantity the person will need. Determine a quantity range for each of the following:

Hot
Warm
Cold
Unknown
Dead



4. Level of purchase power. What is the respondent's budget? Is it adequate to cover this person's need of your product (or service)? Determine the budget parameters that apply to each of the following:

Hot
Warm
Cold
Unknown
Dead

5. Your own criteria. Create individual factors that might affect the status of a lead. Then for each of these factors, provide specific descriptions for each of the following:

Hot
Warm
Cold
Unknown
Dead