

Lead qualification worksheet

For service businesses in India and the US. Complete one copy per inquiry.

Use Fits, Unknown or Does not fit. Confirm missing information before rejecting an inquiry.

Business / inquiry reference

Source and inquiry date

Reachability

Can your team reach the person through a genuine contact route?

Need

Is there a real business need for the service?

Service fit

Can your team deliver the service requested?

Geography

Is the customer or service location within your agreed market?

Timing

Is the expected timing practical for both sides?

Commercial fit

Are scope, service fees and any separate ad budget feasible?

Evidence, missing information and next action

Keep your completed copy private. A business email is a signal, not a requirement. Fit does not guarantee a sale.

Use the worksheet well

Fictional examples below are illustrations, not client results.

1. Relevant need, missing budget

A business wants a service you deliver in an area you cover. Timing is feasible, but the decision-maker and available budget are unclear.

Mark commercial fit Unknown. Ask about the decision process, service-fee budget and separate media budget before quoting.

2. Genuine buyer with a personal email

A local business owner uses a personal email. Their business identity, need, location, timing and scope can be verified.

Do not reject them because of the email domain. Record evidence for each check and discuss a suitable next step.

3. Need outside your scope

A genuine business asks for a service your team cannot provide or a location you cannot serve.

Mark the relevant check Does not fit. Explain the scope mismatch honestly rather than count the inquiry as a sales opportunity.

After qualification

Record the follow-up date, conversation, proposal and eventual outcome in your private lead tracker. Keep a received inquiry separate from a contact-button click and from a paying customer.

If there is no demand for the offer, better targeting alone will not fix the problem. Review market fit, messaging and the inquiry journey before increasing spend.

Need help identifying why inquiries do not fit?

Explore the Attract Better-Fit Leads solution at Rattle Web Solutions.