

Guest Post by Rona Gumban, Production Leader for Callbox APAC campaigns. She has worked with several lead generation and appointment setting campaigns for our clients in the Asia Pacific.

During campaign Kick Off meetings (a conference call between Callbox and the Client about the campaign requirements and processes), the most important question that Callbox asks the clients are:

“What is a qualified lead for you?” Or “How do you define a qualified lead?”

First, we need to understand what a qualified lead is. Here are the 4Ws and 1H of a qualified lead.

- **What is a qualified Lead?**

A lead will be considered qualified if the campaign specifications were indicated or heard from the call. The prospect must express a buying signal or verbalize his “need” from the product or services offered by the client.

- **Who qualifies the Lead?**

The Quality Analyst (QA) is the subject-matter-expert who is responsible in evaluating the Leads based on the campaign specifications. Once the QA qualifies the Lead, he/she submits this to the client.

- **When should a QA qualify a Lead?**

As soon as a Lead is submitted by the caller the Quality Analyst (QA) should approve it within the day. However, some cases may demand another schedule for evaluation depending on either the urgency of the appointment or upon client’s request.

- **Where can you find qualified Leads?**

You can find the submitted leads in the QA Lead Editor Tool. Qualified Leads or Successful Leads can be seen or tracked in the Pipeline CRM, tagged as Appointment Set, Lead Completed or Profile Completed - depending on the campaign or client requirement.

- **How does a Quality Analyst qualify a Lead?**

Evaluating a Lead goes through a strict process. From the word itself, there is no room for

any blunder that may lead to any untoward action from the client.

1. The QA should have the qualification criteria of each campaign in front of him/her before qualifying a Lead such as:

- What is the goal of the campaign?

To set phone or office appointments, to generate leads, or to invite prospects to attend an event (webinar/road show/seminar)

- Who is the Target DM?

This could be specific by job title or any as long as they can make decisions.

- What are the Qualifying Questions?

Considered to be a very important factor as this will give the client/consultant the idea as to how he would customize a proposal for the prospect.

Example Qualifier: Company should have 20 users, 10 computers, etc.

- The Probing Questions:

These questions do not necessarily grade the prospect's qualification because there are no standards set by the client. Probing questions that were answered by the prospect during the call will help our clients understand the prospect's current set-up. As long as the prospect is interested, regardless of his/her answers, the QA will consider the Lead or Appointment.

Ex: What software are you currently using? (Take note of the software's brand)

How are you currently managing your IT needs? Is it in-house or outsourced?

- Special Instructions from the client: Maybe a calendar schedule for which date and time to set the appointment, notes format, etc.

2. Listen to the FULL call recording while simultaneously checking with the script and campaign information.

3. Take note which items have made the call positive and which ones have

negatively impacted the call.

4. Listen to the call recording again to analyze the whole conversation between the caller and the prospect.

5. For doubtful scenarios as to whether to submit the Lead to the client or not (example: the prospect has high interest and has a need but may come short on the required company size), the following actions will help the QA decide:

-List down the positive items vs the negative

-If the positive items are greater in number than the negative, then the QA will consider the Lead as qualified.

-If otherwise, the QA will send the lead back to the caller with notes/advise for possible action steps.

-The last option for contemplating on whether to qualify the Lead as Success or Failed, the QA asks for the other Leaders' opinions like the TL, PL and the AM. This may also result to the AM communicating with the client if they would consider this opportunity or not.

Callbox values quality, we are meticulous in qualifying each and every lead that we submit to our clients. So if you want [qualified and targeted leads](#), look no further.

Original Source:

<http://www.callbox.com.sg/lead-generation-2/the-4ws-1h-of-a-qualified-lead/>