

Deal Qualification Framework

A structured way to score whether a deal is actually worth pursuing, before investing more time in it.

Deal / Prospect: _____

Date Assessed: _____

Score Each Area

AREA	STATUS	NOTES
Budget confirmed or reasonably likely	Yes / Unclear / No	
Decision-maker identified and engaged	Yes / Unclear / No	
Real, acknowledged need or problem	Yes / Unclear / No	
Realistic timeline for a decision	Yes / Unclear / No	
No major disqualifying blocker	Yes / Unclear / No	

Overall Qualification

- ☐ Qualified: pursue actively
- ☐ Needs more discovery before deciding
- ☐ Not currently qualified: deprioritize or disqualify

If Not Fully Qualified, What's Missing?

Name the specific gap; this becomes the focus of your next conversation with the prospect.

Re-Qualification Trigger

If disqualified, what would need to change for this to become worth pursuing again?

The point of qualification isn't to disqualify everything; it's to stop spending real time on deals that were never going to close, so more time goes to the ones that will.