How to Use the Qualification Scorecard

The score is not the decision. The evidence behind the score is the decision.

Why This Tool Exists

Salespeople carry weak opportunities because they want the deal to be real, mistake interest for intent, or refuse to remove dead weight from the pipeline. This scorecard forces the opportunity to earn the time being invested in it.

It does not predict the future. It exposes assumptions. A high total built on weak access, no customer movement, or no believable path to business is still a weak opportunity.

The Scoring Standard

1 - No evidence	Absent or contradicted.
2 - Weak or assumed	Mostly hope, opinion, or unconfirmed information.
3 - Partial evidence	Some support exists, but meaningful gaps remain.
4 - Strong evidence	Supported by customer behavior or reliable information.
5 - Confirmed and documented	Directly confirmed and recorded with specific evidence.

Critical-Factor Rule

An opportunity cannot be rated strong if any of these factors scores a 1: clear problem or need, access to the right people, customer willingness to change, or believable path to business. A high total does not erase a fatal weakness.

What to Look Out For

Scoring the story	Score what is confirmed, not what the customer might do.
Friendliness mistaken for access	A helpful contact is not automatically a sponsor or decision-maker.
A quote mistaken for qualification	Price interest may be real business, shopping activity, or a benchmark.
Vague next steps	"Follow up later" is not a next step. Name the action, owner, and date.
No movement	An opportunity that never advances is telling you something.

Recommended Use

Score the opportunity when enough information exists to make the exercise meaningful. Re-score it after major meetings, important changes, or during pipeline reviews. Healthy opportunities gain evidence and movement. If weak factors stay weak, reduce the investment or walk away.

Do not use the scorecard to protect the pipeline. Use it to tell the truth about the pipeline.

Account and Opportunity Qualification Scorecard

Score each category honestly. A number without evidence is just optimism.

Account / Opportunity		**Date Scored**	
Customer Contact		**Salesperson**	
Current Process Step		**Next Review Date**	

Qualification Factors

Qualification factor	Score 1-5	Evidence or notes
Clear problem or need		
Business impact matters		
Access to the right people		
Fit for your solution		
Customer willingness to change		
Defined next step		
Timing or urgency		
Believable path to business		
Total Score		**Critical factor scored 1? ☐ Yes ☐ No**

Score Guide

32-40 Strong	Keep advancing.
24-31 Developing	Strengthen the gaps before increasing the investment.
16-23 Weak	Reduce the investment until something changes.
8-15 Noise	Park it, return it to coverage, or walk away.

Reality Check

Strongest evidence this opportunity is real:

What is still missing, assumed, or unclear?

Greatest qualification risk:

What must happen next to keep it active?

Next-step owner and due date:

Opportunity Decision

☐ Pursue	☐ Develop	☐ Monitor	☐ Deprioritize / Disqualify