STANDARD OPERATING PROCEDURE

Lead Qualification SOP

Document no.	SOP-SLS-001
Revision	1.0
Owner	Sales Development Manager
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Review cycle	Every 12 months

1. Purpose

To qualify inbound leads consistently and quickly, so account executives spend their time on prospects who genuinely fit and are ready to buy.

2. Scope

Applies to inbound and marketing-qualified leads from first contact through handoff to an account executive. Outbound prospecting sequences are covered by a separate playbook.

Definitions

MQL	Marketing qualified lead. A lead marketing has identified as showing enough interest to be worth sales follow-up.
SQL	Sales qualified lead. A lead that has been reviewed by sales and meets the criteria to move into an active sales process.
BANT	A qualification framework covering budget, authority, need, and timeline.

3. Responsibilities

SDR	Makes first contact with new leads, asks qualification questions, and scores the lead in the CRM.
Sales Development Manager	Reviews borderline leads, resolves routing disputes, and audits qualification quality.
Account Executive	Receives qualified leads, reviews the handoff notes, and confirms fit on the first call.

RACI matrix

Activity	SDR	Sales Development Manager	Account Executive
Respond to a new inbound lead	R/A	I	-
Score the lead against criteria	R/A	C	-
Review a borderline or disputed lead	C	R/A	C
Route the qualified lead to an AE	R/A	I	I
Confirm fit on the first AE call	I	I	R/A

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- CRM with lead scoring fields
- Lead qualification script or call guide
- Ideal customer profile reference sheet
- Lead routing rules document

5. Procedure

Step	Task	Owner	Done
5.1	**Claim the new lead promptly** Claim newly assigned leads in the CRM and make first contact attempt within the team's response time target, since speed strongly affects conversion.	SDR	☐
5.2	**Review available context first** Check the CRM for the lead's source, submitted form details, and any prior activity before reaching out, so questions aren't repeated that the lead already answered.	SDR	☐
5.3	**Make first contact** Call or message the lead using the approved outreach sequence, referencing the specific content or offer that brought them in.	SDR	☐
5.4	**Ask discovery questions** Ask open questions to understand the lead's role, the problem they're trying to solve, and how urgent solving it is for their team.	SDR	☐
5.5	**Check budget and authority** Ask about the lead's decision-making process and whether budget has been discussed internally, without pressuring for an exact number on the first call.	SDR	☐
5.6	**Compare the lead to the ideal customer profile** Compare the lead's company size, industry, and stated need against the ideal customer profile reference sheet to judge overall fit. **Checkpoint:** The lead's fit against the ideal customer profile is recorded in the CRM before it is scored.	SDR	☐
5.7	**Score the lead in the CRM** Enter the lead's score based on budget, authority, need, and timeline into the CRM's qualification fields, following the documented scoring rules.	SDR	☐
5.8	**Disqualify a poor-fit lead** If the lead clearly doesn't meet minimum criteria, mark it disqualified with a specific reason in the CRM rather than leaving it unscored or routing it anyway.	SDR	☐
5.9	**Escalate a borderline lead** When a lead is close to the qualification threshold but unclear, bring it to the sales development manager for a second opinion instead of guessing. **Checkpoint:** Every borderline lead is reviewed by the sales development manager before it is qualified or disqualified.	Sales Development Manager	☐
5.10	**Route the qualified lead to an AE** Route the qualified lead to the correct account executive based on territory or segment rules, with complete handoff notes in the CRM.	SDR	☐

Step	Task	Owner	Done
5.11	**Confirm fit on the first AE call** Review the SDR's notes before the call, and confirm the stated need and authority still hold before moving the opportunity further into the pipeline.	Account Executive	☐
5.12	**Send a disqualified lead back to nurture** If the AE finds the lead isn't actually ready or doesn't fit, route it back to the marketing nurture track instead of leaving it stalled in the sales pipeline.	Account Executive	☐

6. Quality checks

- Every new lead receives a first contact attempt within the response time target.
- Every qualified or disqualified lead has a documented reason in the CRM.
- Borderline leads are reviewed by the sales development manager before routing.
- AEs confirm stated fit within their own first call and log any mismatch.

7. Records

- CRM lead qualification fields and notes
- Lead routing and handoff log
- Disqualification reason log

8. KPIs

- Average time to first contact on a new lead
- Percentage of qualified leads accepted by AEs without disqualification
- Lead-to-opportunity conversion rate

9. Common mistakes

- Routing a lead to an AE without complete handoff notes.
- Scoring a lead based on gut feel instead of the documented criteria.
- Letting a new lead sit unclaimed past the response time target.
- Disqualifying a lead without recording a reason.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	September 15, 2026	Initial release	Alexa Uskova

Approval

Prepared by	Approved by	Date

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