The Qualification Scorecard

Separate real opportunities from flattering conversations, before they eat your diary

You know the proposal: weeks of thinking, evenings of writing, for a prospect who was never going to buy. In an expertise-led firm, that time came straight out of delivery or out of prospects who would have bought. This scorecard exists to stop it happening again, by forcing the questions that matter before serious time is invested, not after.

Use it when an opportunity starts feeling real: after the first proper conversation, and always before agreeing to write a proposal. Score honestly; the scorecard only protects you if you let it.

The eight tests

Score each from 0 to 3, where 0 is “no, or we don’t know” and 3 is “yes, confirmed by the prospect, not assumed by us”. The distinction in that last phrase does most of the work: hope scores zero.

1. Problem. They have a problem we solve, they've said so in their own words, and it’s costing them something they can name. ____ / 3

2. Priority. Solving it matters to them now, this quarter or next, not “at some point”. ____ / 3

3. Fit. This is squarely the work we’re excellent at, for the kind of organisation we serve best, not an interesting stretch. ____ / 3

4. Access. We are talking to the person who can say yes, or they are actively bringing us to that person. ____ / 3

5. Money. A budget exists, or the cost of the problem clearly justifies one, and we’ve discussed money out loud without flinching. ____ / 3

6. Process. We know how they'll decide: who’s involved, against what criteria, by when, and who else they're considering. ____ / 3

7. Engagement. They're doing work too: answering promptly, sharing information, turning up. Effort is flowing both ways. ____ / 3

8. Champion. Someone inside genuinely wants us to win and is acting like it. ____ / 3

Total: ____ / 24

Reading the score

18 to 24: A real opportunity. Invest properly, including the proposal, and move with pace.

12 to 17: Promising but incomplete. Do not write the proposal yet. Identify your two lowest scores; each is a conversation to have first. “Before I put a proposal together, can I ask how the decision will be made?” is not pushy, it’s professional.

Under 12: This is a conversation, not an opportunity. Stay warm, be helpful, put it into nurturing, and spend the reclaimed time on prospects scoring higher. Walking away early isn’t losing a deal; it’s declining to fund one that didn’t exist.

Three habits that make it stick

Score in writing, every time; the discipline collapses the moment it becomes a feeling rather than a number. Re-score when something changes, because opportunities move in both directions. And watch your own pattern over a few months: if you keep overriding low scores and proposing anyway, that’s not the scorecard failing, that’s the rescue reflex every expert firm has, and seeing it on paper is the first step to retiring it.

This scorecard is one stage of a larger system: the eight stages by which expertise-led firms win and keep clients. To find which stage is your constraint, take the free fifteen-minute Revenue System Self-Assessment at smarterentrepreneurs.co.uk, and if you'd like to talk through what you find, book a Discovery Call. No pitch, no pressure.