

LEAD QUALIFICATION QUESTIONNAIRE

Pitch formalities

In a nutshell, what is the problem/goal?
Why did they approach us?
(Internal question:) Can we offer a significant solution to this?
Why exactly did they call for proposals?
Are the reasons understandable and legitimate?

Is there a defined and existing budget?
What is it? Is it adequate?
Is there a pitch fee?

What does the decision-making process look like and who is the decision-maker?
Will we have access to them? Do we already have a relationship with them?

What kind of agency profile is the client looking for (e.g., niche/boutique, international, consulting, subcontractor, etc.)?
Who are the competitors? Do we have a decisive advantage over them?
Will we be made dependent upon another service provider in this task?

What's the timing like? Is it realistic?
Does it fit into our own planning?
Do we have the right internal resources available?

What's the chemistry like?
Does the task suit our business strategy? (Does it further the agency's goals?)
Is it financially appealing?
Will the client be good for our reputation?
Will it be fun to do?