

EOS Core Process: Lead Qualification and Discovery

Process Owner: [Person from EOS Accountability Chart]

Last Updated: [Date]

Review Date: [Next quarterly review date]

EOS Integration

Connected EOS Tools:

Related EOS Rocks: [Current quarter Rocks that improve this process]

EOS Scorecard Metrics: [Weekly numbers tracked for this process]

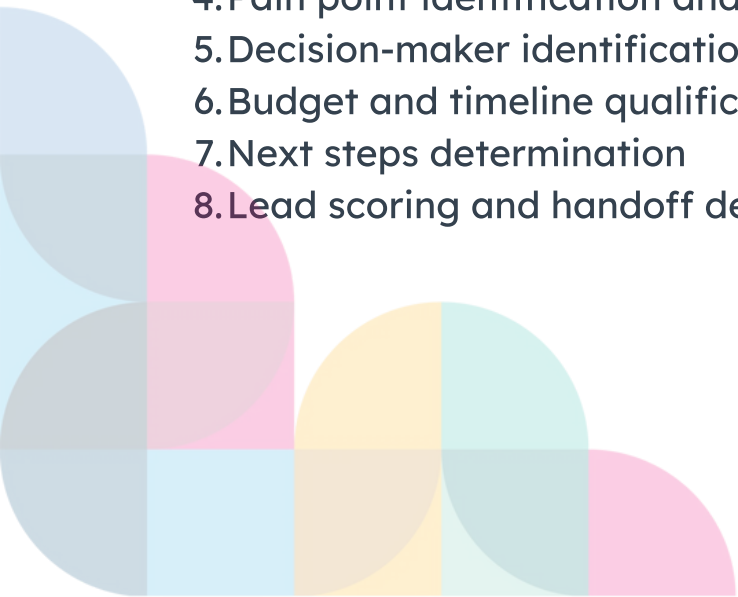
Accountability Chart Connection: [Which seat owns this process]

Process Overview

Purpose: To systematically evaluate and qualify incoming leads to determine their fit, need, budget, and timeline, ensuring sales resources are focused on high-potential prospects while providing a consistent discovery experience.

High-Level Steps

1. Initial lead assessment and research
2. Discovery call scheduling and preparation
3. Needs assessment conversation
4. Pain point identification and validation
5. Decision-maker identification
6. Budget and timeline qualification
7. Next steps determination
8. Lead scoring and handoff decision



Core Process Detailed Steps

Step 1: Initial Lead Assessment (15 minutes)

- Review lead source and any available information
- Check company website, LinkedIn, recent news
- Identify company size, industry, potential fit
- Prepare 3-5 discovery questions specific to their business

Step 2: Discovery Call Scheduling (5 minutes)

- Send calendar link with clear agenda
- Include prep questions for prospect to consider
- Confirm decision-makers who should attend
- Set expectations for call duration (30-45 minutes)

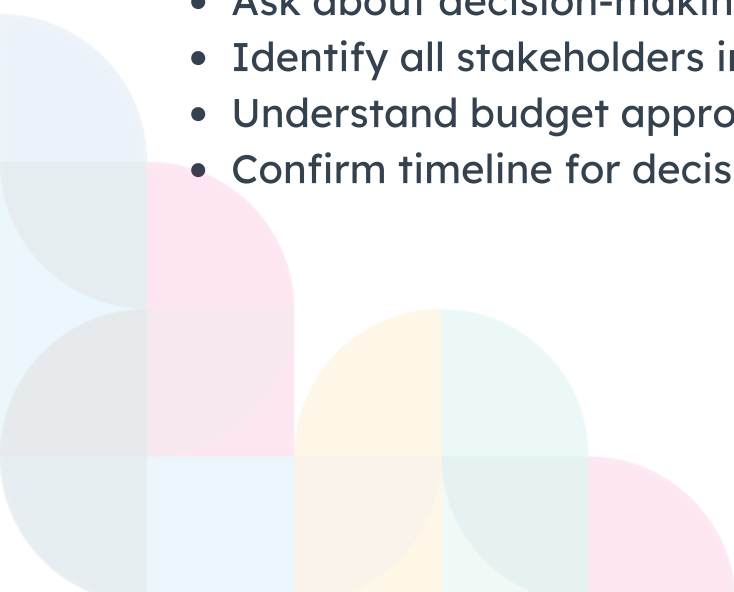
Step 3: Needs Assessment Conversation (30-45 minutes)

- Open with agenda confirmation
- Ask open-ended questions about current state
- Explore challenges and pain points
- Understand current solutions and gaps
- Listen 70%, talk 30%

Step 4: Pain Point Validation (10 minutes)

- Summarize what you heard
- Confirm impact and urgency
- Quantify cost of current problems
- Explore consequences of status quo

Step 5: Decision-Maker Identification (10 minutes)

- Ask about decision-making process
 - Identify all stakeholders involved
 - Understand budget approval process
 - Confirm timeline for decisions
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Core Process Detailed Steps (cont.)

Step 6: Budget and Timeline Qualification (10 minutes)

- Explore budget parameters (ranges, not exact)
- Understand implementation timeline
- Identify any seasonal or business constraints
- Confirm project priority level

Step 7: Next Steps Determination (5 minutes)

- Summarize mutual interest
- Propose specific next steps
- Schedule follow-up meeting
- Send recap email within 24 hours

Step 8: Lead Scoring and Documentation (10 minutes)

- Score lead based on fit, need, urgency, budget
- Update CRM with detailed notes
- Tag appropriate team members
- Set follow-up reminders



Quality Standards & Success Metrics

Must-Have Standards:

- [] Standard 1 (measurable)
- [] Standard 2 (measurable)
- [] Standard 3 (measurable)

EOS Scorecard Metrics:

Weekly Metric 1: [Target number]

Weekly Metric 2: [Target number]

Monthly Metric: [Target number]

Accountability:

- Lead Owner: Conducts all qualification steps, maintains CRM
- Sales Manager: Reviews high-value leads, provides coaching
- Marketing: Provides lead context and nurturing support

Frequency:

- Process initiated within 24 hours of lead receipt
- Discovery calls scheduled within 3-5 business days
- Follow-up activities completed within 24 hours of each interaction

Sample Success Metrics (adjust for your team + create scorecard):

- Lead response time (target: <24 hours)
- Discovery call conversion rate (target: >40%)
- Qualified lead conversion rate (target: >25%)
- Time from lead to qualification decision (target: <7 days)
- Quality score accuracy vs. eventual close rate

Process Connections

Receives From: [Which EOS core process feeds into this one]

Hands Off To: [Which EOS core process this feeds into]

Dependencies: [Other processes or resources needed]

Tools & Resources

Required Systems/Tools:

Tool 1

Tool 2

Template/Document links

Training Materials:

Link to training video

Link to detailed SOPs (if needed)

Onboarding checklist

Troubleshooting & Common Issues

If [Problem], Then [Solution]:

Problem 1 → Solution 1

Problem 2 → Solution 2

Problem 3 → Solution 3

Escalation: [When to involve process owner or leadership team]



Process Improvement

Last Quarter's Improvements: [What was changed and why]

Current Issues to Address: [Items for next EOS Rock or Level 10 discussion]

Issue 1

Issue 2

Ideas for Next Quarter: [Potential improvements to consider]

Approval & Sign-Off

Process Owner Approval: [Name + Date]

Leadership Team Review: [Date reviewed in Level 10 or quarterly]

Next Review Date: [Align with EOS quarterly cycle]



Quick Reference Card

[One-page summary of key steps for daily use]

The 5 Key Steps:

[Step 1 summary]

[Step 2 summary]

[Step 3 summary]

[Step 4 summary]

[Step 5 summary]

Key Metrics: [2-3 most important numbers to track]

Emergency Contacts: [Who to call if process breaks down]

