



Lead Qualification System Planner

A worksheet for defining lead sources, qualification rules, enrichment, human review, routing, test cases, and measures.

How to use this document

Print it or open it beside your notes. Shaded cells are yours to fill in. Work through it with the people who run the workflow today, then bring the completed version to a conversation about what to build.

Use this worksheet before automating lead qualification. It helps a revenue team define the inputs, rules, human review points, routing outcomes, and measures that a dependable system needs.

1. Lead sources

Source	What arrives	Required fields	Current owner
Website form			
Email or inbox			
Referral or partner			
Event or community			

2. Fit and disqualification rules

Write rules in a way two people could apply consistently.

Rule	Include, exclude, or escalate	Evidence required
Company or account fit		
Problem or use case		
Geography or service area		
Budget or timing		
Existing relationship		

3. Enrichment and confidence

List the information the system may look up, the source it may use, and what happens when the information is missing or contradictory.

Field	Source	Required confidence	Missing-data action
Company size			
Role or seniority			
Trigger or buying signal			
Existing systems			

4. Human review

The system should route a lead to a person when the score is uncertain, the information conflicts, the account is strategically important, or the response could damage trust.

Condition	Human owner	Response target	Decision recorded
Low confidence			
High-value account			
Sensitive or unusual request			

5. Routing outcomes

Outcome	Destination	Owner	Service level
Sales follow-up			
Nurture			
Partner referral			
Not a fit			

6. Test cases and measures

Before launch, test normal leads, incomplete records, duplicate leads, poor-fit leads, conflicting enrichment, and high-value exceptions. Track qualification agreement, response time, routing accuracy, false positives, false negatives, and booked conversations.

This planner connects to Flowgrammer's AI Lead Qualification system offer. For broader workflow design, see AI Automation Systems.

Continue with Flowgrammer

- Use the planner to define the first version of the system.
- Review the advertising lead intelligence engine.
- Estimate the workflow value with the Automation ROI Calculator.
- Book a lead qualification system conversation.

Ready to build it?

Bring this worksheet to a fit call and we will map the system with you.

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