QUALIFYR

Sample

Qualification Blueprint

Harborline — a founder-led B2B brand and demand agency. 12 people. Custom retainers. Open calendar.

WHAT THIS IS

A sample Qualification Blueprint.

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How to read this

Harborline lets anyone book a 45-minute strategy call from the site. Qualification happens on the call. This Blueprint first measures what that costs, then writes the rules Harborline would actually run: who is in, who is out, how strong-fit is scored, what to ask, and what happens next.

01	Current snapshot	Cost of the status quo, in their units
02	Qualification criteria	Minimum bar. Fail any one → not pursued
03	Opportunity strength	What makes a qualified lead more worth the next hour
04	Tiers and score	Formula, thresholds, one worked lead
05	Intake sequence	What to ask, in what order, why
06	Decision paths	What happens to qualified and disqualified leads

Agency

Harborline helps B2B professional-services firms (consultancies, accounting, boutique law, architecture) win better-fit retainers through brand, website, and demand programs. Founder Dana Ellison still runs every strategy call. Home market: US. Typical first-year client: $48,000. Minimum retainer they will actually take: $8,000 / month, six months.

01 · CURRENT SNAPSHOT

Inbound qualification currently costs $6,500 / month

22.5 hours of founder time — 13% of selling capacity — spent deciding whether inbound is worth pursuing.

Founder hours / month	Of selling capacity	Monthly cost
22.5	**13%**	**$6,500**

Breakdown

ACTIVITY	WHAT IT IS	VOLUME / MO	TIME / LEAD	HOURS	COST
Context gathering	Read the inquiry, check the site and LinkedIn, log notes	40	15 min	10.0	$3,000
Strategy calls + prep	Prep, hold the call, including no-shows	14	40 min	9.5	$2,850
Admin	Scheduling, rescheduling, polite follow-up	14	15 min	3.0	$900
Total		—	—	22.5	$6,500

$6,500 ÷ 2 closed inbound deals = $3,250 of founder capacity spent on qualification per acquired client.

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Revenue gap (labelled estimate)

$48,000–$96,000 / year

About 4 qualified-looking leads per month go unanswered or cold. At a 20% close rate on fit conversations and $48k average first-year value, that is 1–2 clients / year not won. Estimate. Depends on how many were genuinely winnable.

Scale cost

Inbound growth creates proportional qualification work. Nothing in the current process bends.

	TODAY	AT 2× INBOUND
Leads / month	40	80
Founder hours on qualification	22.5	45
% of selling capacity	13%	25%
Monthly cost	$6,500	$13,000

Inputs used

Founder hourly value $300 (monthly revenue $54,000 ÷ 180 working hours — Harborline's figures). Volumes: last 30 days, calendar + inbox. Time per activity: founder estimates, confirmed in session. Conservative basis: where a range was given, the lower bound is used. Hours rounded to 0.5. Dollars rounded to $500.

No solution language on this page. It only states current cost.

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The minimum bar

A lead is qualified only if every row is true. Fail any one and the lead is not pursued — it is declined or referred, never put on Dana’s calendar.

GATE	IN	OUT (AUTOMATIC)
Services / outcomes	Wants brand, website, or ongoing demand generation for a B2B professional-services firm. Problem is “we are not winning the right work.”	Paid ads only, SEO-only retainers under $4k, “just need a logo,” recruiting, or consumer/DTC brands.
Budget	Willing to invest at least $8,000 / month, or a project of $40,000+.	Exploring “a few thousand to test.” Unwilling to name a range after one follow-up.
Engagement	Retainer of 6+ months, or a defined project with a named decision date.	One-off “can you just look at this,” unpaid audits, RFP mills with no owner.
Industry	B2B professional services: consulting, accounting, boutique legal, architecture, specialist advisory.	Gambling, adult, firearms, crypto trading, political campaigns, local restaurants, home services.
Geography	US-based company, or a US go-to-market they can actually serve.	No English-speaking commercial team. Market Harborline cannot run campaigns in.
Authority	Founder, partner, or head of marketing who can convene the buying conversation.	Student, vendor collecting quotes, intern “researching agencies.”
Readiness	Has a live site or a funded rebuild. Can name who they sell to.	Idea-stage, no offer, “we’ll figure out the product after the brand.”
Advice vs hire	Hiring for delivery in the next 90 days.	Wants a free strategy download and will not buy.

What to pursue first, among those who passed

Scoring is only for leads that already cleared the bar. It does not re-qualify. It tells Dana who to prep hardest.

Five additive factors (sum to 1.00). One multiplier: source. Non-linear spacing on purpose — the top bin is not "+25%."

FACTOR	WHY	WEIGHT	TYPE
Budget vs core	Independent evidence they can buy the real offer	25%	Additive
Service fit	Core vs secondary vs stretch	25%	Additive
Timeline	Urgency and willingness to start	20%	Additive
Authority	Speed of a real decision	15%	Additive
Company shape	Headcount / sophistication as a proxy for deal quality	15%	Additive
Source	Changes how much to trust everything else	×0.7 – ×1.3	Multiplier

Bins (illustrative)

FACTOR	LOW	MID	HIGH
Budget	$8–12k/mo → 40	$12–18k → 70	$18k+ → 100
Service fit	Secondary only → 40	Core + secondary → 75	Core demand + brand → 100
Timeline	90 days+ → 35	30–90 days → 70	This month → 100
Authority	Recommender → 40	Shared → 70	Decides → 100
Company	2–5 people → 45	6–40 → 80	40–150 with a marketing seat → 100
Source	Cold / paid → ×0.7	Organic → ×1.0	Referral / partner → ×1.3

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Score = (Σ weight × factor) × source

Then bucket. Thresholds are set to Harborline's actual calendar: Dana can run five serious conversations a week. Tier 1 fills those first.

Tier 1 · Strong
Score ≥ 78. Prep fully. Offer times this week.

Tier 2 · Moderate
58–77. Book into remaining slots. Shorter prep.

Tier 3 · Weak
Passed the bar, < 58. Nurture or a 15-min screen, not a strategy call.

Worked example — Meridian Group (referral)

B2B consultancy, 28 people, partner-led. Wants brand + demand retainer. $16k/mo. Start in 3 weeks. Partner is on the form. Referred by a current client.

FACTOR	RAW	WEIGHT	CONTRIBUTION
Budget ($16k)	70	0.25	17.5
Service fit (core + core)	100	0.25	25.0
Timeline (3 weeks)	100	0.20	20.0
Authority (partner)	100	0.15	15.0
Company (28)	80	0.15	12.0
Subtotal			**89.5**
Source multiplier (referral ×1.3)			**116 → cap 100**

Decision: Tier 1. Dana's next open strategy slot. Pre-call note already has problem, budget, and who else is in the room.

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Ask cheap exits first. Enrich after they pass.

The prospect has not committed. Every extra question has a cost. Cap: 7 questions. Stop early on a hard disqualifier. “Not sure” is always available where the answer might not exist yet.

Q1 · Outcome (multi-select)

What do you want help achieving in the next two quarters?
More of the right conversations · A site that sells the firm · A brand that matches the work · Demand on a named offer · Other

Q2 · Need (single)

Which is most true right now?
We spend on marketing and cannot see what it produces · We are not reaching the buyers we want · We need a consistent engine, not another project · We are replacing an agency · Other

Q3 · Service gate

If Harborline only did one thing with you first, what should it be?
Brand · Website · Demand / content · Full retainer · Not sure

If the answer maps to “logo only” or “ads under $4k” → decline path.

Q4 · Budget

To make sure this is a fit, what monthly investment range is realistic?
Under $8k · $8–12k · $12–18k · $18k+ · Not sure

Under $8k after one clarification → decline or refer.

Q5 · Timeline

When do you want this moving?
This month · 30 days · 90 days · Exploring

Q6 · Authority

If this looks right, what has to happen on your side to move?
I decide · I decide with others · I recommend · We have not defined that

Q7 · Open

Anything we should know before a conversation — past agencies, constraints, expectations?

Follow-up is allowed only when the last answer would change the route (vague budget, mixed outcomes, “not sure”). Test: would Harborline make a different decision if they had this answer?

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What happens after the answers

Pre-call qualification answers: is this prospect worth a conversation? The strategy call answers: can we solve it, and is there a deal?

Disqualified

PATH	WHEN	DO
Decline	Hard gate failed (budget, industry, not hiring, consumer brand)	Short, specific reason. No calendar. Preserve the relationship.
Refer	Good company, wrong offer (e.g. performance-only, sub-$8k)	Named referral when Harborline has one. Optional future fee, not promised here.

Qualified

PATH	WHEN	DO
Strategy call (Tier 1)	Score ≥ 78	Reveal calendar. Dana preps from the intake summary.
Strategy call (Tier 2)	58–77	Reveal remaining slots. Standard prep.
Human review	Passed gates, but budget “not sure” + high fit otherwise	Collect email. Dana decides within one business day. Do not auto-book.
Nurture	Passed gates, exploring / 90 days+	No strategy call. Send one relevant piece. Monitor a trigger (funding, hire, site launch).

If this were later built as a system

Intake asks these questions, applies the gates, writes a one-page summary to Dana, and only then shows the calendar. That build is optional. This Blueprint is usable as a human checklist tomorrow. Harborline can run it from a form and a spreadsheet.

CLOSE

What a real Blueprint session produces

Same six sections. Your numbers, your disqualifiers, your phrasing — including the ugly ones you only say out loud. One consolidated revision. Delivered in three business days after the working session.

- Current snapshot from your calendar and your rate, not a benchmark slide
- Criteria you will actually enforce, including red-flag phrases from bad clients
- A score you can defend in a Monday pipeline review
- Questions in order, with the cheap exits first
- Named next actions, including “do nothing”

This file is a sample.

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