MotionOps

CONTRACTOR SCALER HUB · BUILD A SALES PROCESS YOUR TEAM CAN RUN

Opportunity Qualification Scorecard

Goes with the lesson on qualifying construction leads. Fill in sections 1 and 4 once and give them to whoever answers the phone. Then fill in a scorecard (section 3) on every new lead, right after the first call and before anyone books a site visit.

1. Your fit profile

One page that says what a good job looks like for you right now. Write the size range from your own numbers, not a wish: if your smallest profitable job is $15,000, that's your floor. A full backlog means you can be stricter; a slow month means you might take smaller jobs on purpose.

Criterion	Good fit	Not a fit
Example Type of work	Bathrooms, kitchens, basements, decks	New construction, roofing, commercial
Example Size	$15,000 to $120,000	Under $5,000 (refer out or handle as a service call)
Example Area	Within 40 minutes of the shop	More than an hour away
Example Timing	Start in 3 weeks to 6 months	"Next week," or "sometime next year, maybe"
Example Budget	In the range of what similar jobs cost you	Far below what the work costs
Example Decision	Everyone who decides can meet you	One spouse "will decide later," or a landlord who isn't involved
Example Property	Owner-occupied, access is reasonable	Unpermitted work they want hidden, or a property they don't control
Type of work		
Size		
Area		
Timing		
Budget		
Decision		
Property		

PROFILE WRITTEN ON

NEXT REVIEW (MONTHLY)

The budget range you give on the call

Give the range yourself, from your own past jobs. Some homeowners don't know what work costs and won't say a number first. If they're far below it, you've saved them a wasted visit as well.

Job type	"Jobs like this have been between ... and ... for us"
Example Bathroom	$28,000 to $45,000

2. Example: three calls on one morning

Made up to show the method.

Criterion	Lead A: primary bath	Lead B: small deck repair	Lead C: kitchen
Type of work	2	1	2
Size	2	0 ($3,000)	2
Area	2	2	1 (55 minutes away)
Timing	2	2	1 ("maybe spring")
Budget	2	1	1 (lower end of the range)
Decision	2	2	1 (spouse away until next week)
Property	2	2	2
Total	**14: go**	**10, but a zero: no-go**	**10: go**

Lead A gets a visit this week. Lead B is a good customer for someone else: refer them to a handyman you trust. Lead C squeaks into "go" with four ones: book the visit for when both decision makers are home, and tell the estimator the budget is tight before they walk in.

3. Scorecard: one per lead, right after the call

LEAD NAME	DATE OF THE CALL	PHONE
TAKEN BY	**PROPERTY ADDRESS**	**HOW DID YOU HEAR ABOUT US?**

Ask every question and write what they said. Then score each criterion: **2** clearly a fit, **1** unclear or close to the edge, **0** clearly not a fit.

Criterion	Ask	A good answer sounds like	What they said	Score
Type of work	What would you like done, and what's prompting it now?	A clear project and a reason: "The shower's leaking into the ceiling below"		
Size	From the project they describe and the budget answer	Inside your size range		
Area	Where is the property?	An address inside your area		
Timing	When would you like it finished?	A date or a season inside your window		
Budget	Have you set a budget? Jobs like this usually run between X and Y for us.	"That's about what we expected," or a number inside your range		
Decision	Who else will be part of the decision?	"My wife and I, and we can both be there"		
Property	Do you own the property?	Yes, or a landlord who's involved		
Competition	Are you getting other prices?	Any honest answer; it tells you how to follow up		No score
Total				**/ 14**

Decide and take the next step (rules are examples)

- [ ] **Go:** no zeros and 10 or more points out of 14. Book the site visit.
- [ ] **Maybe:** no zeros, under 10 points. A short follow-up call or a video call first; book the visit if the gaps close.
- [ ] **No-go:** any zero. Say no politely and refer them on (section 5).

GO: SITE VISIT BOOKED FOR	MAYBE: FOLLOW-UP OR VIDEO CALL ON	NO-GO: REFERRED TO

- [ ] Call notes and score saved on the lead record; go leads handed to the estimator with them

4. Who qualifies

Who	What they do	Name
Owner	Writes the fit profile and the score rules; reviews them monthly	
Office coordinator	Takes the first call, asks the questions, scores the lead, books the visit or closes the lead	
Estimator	Gets the "go" leads with the call notes and score, and calls back the "maybes"	

The call notes go on the lead record, not in someone's notebook, so the estimator arrives already knowing the budget, the timing and who decides.

5. Say no well

A no-go lead is still a person who might send you a referral or call again in two years. Be quick, honest and useful.

> CHANGE THE WORDS TO FIT THE JOB
> Thanks for thinking of us. A repair this size isn't something we can schedule well, and I don't want you waiting weeks. Here's a handyman we trust who does this kind of work. If you ever plan a bigger project, call us.

Businesses we refer out to: handymen, other trades, contractors who do the work you don't. Some of them will send work back.

Business	Work they do	Phone

6. Once a month: check whether your scoring works

Check	What we found	Rule to change
Close rate by score: do "go" leads with high scores really win more often than the low ones?		
Visits that went nowhere: what score did they have? Which criterion was wrong?		
No-go leads you'd have wanted: did a rule turn away good work?		

If high-scoring leads don't close better, the criteria are measuring the wrong things. **Change one rule at a time.**

What to review

What to review	Month: _____	Month: _____
Lead-to-visit rate		
Visit-to-proposal rate		
Close rate by lead score		
Site visits per week that didn't lead to a proposal		