VERTEX GROWTH

QUALIFIED-LEAD CRITERIA CHECKLIST

Confirm your campaign acceptance rules before outreach. Unknown stays unknown.

INVESTORS & WHOLESALERS

- ☐ Owns property or verified authority
- ☐ Open to selling; property condition captured
- ☐ Timeline and asking price recorded, including unknowns
- ☐ Reason for selling; CRM notes and next step

ROOFING

- ☐ Homeowner or decision-maker confirmed
- ☐ Roof issue or age captured
- ☐ Insurance/claim status: no coverage promises
- ☐ Timeline captured; inspection slot agreed

B2B

- ☐ Right decision-maker; need confirmed in their words
- ☐ Timeline captured
- ☐ Budget range or buying authority captured
- ☐ Next step agreed

Campaign exceptions / rejected-lead reason / acceptance owner

Follow-up owner / due date / permitted calling windows / DNC restrictions

Qualified means ready for your agreed next conversation, not guaranteed to close.

Lists must follow your legally reviewed rules. This checklist is not legal advice.