BANT SaaS Lead Qualification Checklist

Phase 1: Firmographic & Demographic Intake

- [ ] Capture the user's corporate email address on your inbound website forms to auto-enrich account history with background data enrichment tools.
- [ ] Cross-reference the company's domain inside online business directories to log headcount, industry type, and headquarters location.
- [ ] Verify that the registering user's explicit job title matches a persona that acts as a buyer or an active internal champion.
- [ ] Check the lead's geographical location against your localized tax compliance and regional currency capabilities.

Phase 2: Budget Evaluation

- [ ] Ask the prospect about the financial cost of their current manual workarounds to establish a baseline value comparison.
- [ ] Inquire about the typical investment range they have allocated for this software category this fiscal year.
- [ ] Determine if the funding originates from the contact's immediate department or requires external reallocation.
- [ ] Confirm that the prospect's financial cap aligns with your software subscription pricing tiers.

Phase 3: Authority Mapping

- [ ] Ask the lead to walk you through their organization's standard procurement, legal, and security review processes.

- [ ] Identify the corporate title of the economic buyer who holds final contract signing authority.
- [ ] Map out the wider buying group by identifying who else inside the department wins or loses control with this deployment.
- [ ] Provide your internal champion with a forwardable, one-page business case narrative to share with decision-makers.

Phase 4: Need & Value Verification

- [ ] Pinpoint the exact technical bottlenecks or platform latency issues causing operational friction.
- [ ] Calculate the cost of inaction if the target organization fails to solve this problem by next quarter.
- [ ] Document the client's mandatory, must-have feature requirements versus nice-to-have requests.
- [ ] Match their specific pain points to a demonstrated product use case or existing client testimonial.

Phase 5: Timeline & Trigger Discovery

- [ ] Establish the exact target date the prospect needs to have the software platform fully active in production.
- [ ] Pin down the specific corporate trigger event driving the urgency, such as a legacy vendor renewal or board review.
- [ ] Uncover any competing internal software projects that might delay this implementation schedule.
- [ ] Disqualify the lead immediately if their implementation timeline depends on features missing from your current product roadmap.

Phase 6: Product Usage Tracking (For PLG Models)

- [ ] Monitor app telemetry to log when a trial user invites more than three team members into their active workspace.
- [ ] Set up system alerts when a freemium account utilizes over 80% of its free tier usage allocation.
- [ ] Log a successful API key generation or external integration activation as an intent signal.
- [ ] Route the account history directly to an account executive for direct outreach the hour product activation milestones are achieved.