
Lead Qualification Checklist

Score every lead in 2 minutes - know who will buy

BRIXFIT

A free playbook by BrixFit

Built for online and hybrid fitness coaches

brixfit.app

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CRITERIA TO SCORE

Every coach has taken a discovery call with someone who "just wanted to think about it" and never came back. That call cost you 30 minutes plus the follow-up time. Multiply that by ten bad leads a month and you have lost days of coaching.

This checklist fixes that. Score every lead on 6 criteria before the call. Each criterion scores 0, 1, or 2. A total of 12 means you have a buyer. Below 6 means you walk away politely before the call ever happens.

THE SCORECARD • CRITERION 1

Criterion 1: Goal Clarity

What to look for: the lead can describe a specific outcome in their own words, not a vague wish like "get fit" or "lose weight."

- "What exactly do you want to change about your body in the next 90 days?"
- "If this works perfectly, what does your life look like 6 months from now?"
- "What have you already tried to reach this goal?"

Scoring: 2 = specific goal with a deadline ("lose 8 kg before my brother's wedding in December"). 1 = rough goal, no deadline ("want to get stronger"). 0 = vague or no real goal ("just want to be healthy, I guess").

THE SCORECARD • CRITERION 2

Criterion 2: Timeline

What to look for: the lead wants to start soon. A lead who wants to start "someday" is not a lead, it is a follower.

- "When were you hoping to start coaching?"
- "Is there an event or deadline driving this?"
- "What happens if nothing changes in the next 3 months?"

Scoring: 2 = wants to start within 2 weeks. 1 = within 1 to 2 months. 0 = no timeline, "sometime this year" or "just exploring."

THE SCORECARD • CRITERION 3

Criterion 3: Budget Readiness

What to look for: the lead has thought about money and can pay for coaching. You do not need their bank statement. You need a straight answer.

- "Have you thought about what coaching like this usually costs?"
- "Are you ready to invest in coaching if this is the right fit?"
- "Who else is involved in this decision?"

Scoring: 2 = clear yes, expects to invest. 1 = unsure about cost but open. 0 = "it depends on the price," wants everything free, or cannot afford it right now.

Criterion 4: Coachability

What to look for: the lead will follow a plan. The hardest clients are not the unfit ones, they are the ones who argue with every instruction.

- "How do you feel about following a structured plan instead of doing your own thing?"
- "When a coach tells you something you disagree with, what do you do?"
- "On a scale of 1 to 10, how ready are you to change your daily routine?"

Scoring: 2 = open, ready, asks good questions. 1 = willing but nervous, needs reassurance. 0 = knows everything already, wants you to confirm their own plan.

Criterion 5: Contact Responsiveness

What to look for: the lead replies on time and shows up. How they treat you before paying is how they will treat you after.

- Watch: did they reply to your messages within 24 hours?
- Watch: did they confirm the call time without you chasing them?
- Watch: did they fill your intake form completely or leave half blank?

Scoring: 2 = fast replies, confirmed on time, form complete. 1 = slow but eventually responsive. 0 = ghosts for days, no-shows, or one-word answers.

Criterion 6: Decision-Maker

What to look for: the person on the call can say yes. If they need to "check with my husband" and he never joins a call, you are selling to the wrong person.

- "If this feels right today, are you able to decide, or does someone else need to be involved?"
- "Has that person seen what coaching involves?"
- "Can we get them on the call for the last 10 minutes?"

Scoring: 2 = they decide alone. 1 = someone else involved but reachable and informed. 0 = decision-maker absent, uninformed, or openly against spending.

Lead Scorecard

Total score	Lead type	What to do
10-12	Hot	Book the call this week. Send the AI brief to yourself first and close.
6-9	Warm	Book the call, but address the weak criteria first (send budget info, set expectations).
0-5	Cold	Do not take the call. Send the polite decline message below and move on.

TIP

Score the lead BEFORE you offer a call slot. Hot leads get your calendar link in the first reply. Cold leads never see your calendar.

RED FLAGS

Red-Flag Leads: 5 Signs to Disqualify Politely

Some leads will waste your time even with a good score in one area. Disqualify fast when you see these.

- Price shopper: asks only about discounts, compares you to free YouTube workouts, wants your cheapest option before hearing the program.
- Freebie hunter: wants the free trial, free plan, free consultation, free diet chart - and has no intention of ever paying.
- The arguer: corrects your every message, sends you reels "proving" you wrong, has fired three coaches before you.
- The ghost: takes 4 days to reply to "are you free Tuesday?", then asks if you are free in 10 minutes.
- The someday lead: "I will start after the wedding / after exams / after Diwali / next year." There is always a next event.

Polite decline message (copy-paste):

"Thanks for reaching out! Based on what you have shared, I don't think my coaching is the right fit for you right now. I only take on clients I am confident I can get results for, and I would rather be honest than waste your time. If things change in the future, my door is open. Wishing you the best with your fitness!"

TIP

Saying no to a bad lead is saying yes to two good ones. Your calendar is your most expensive asset.

BRIXO AI, MAPPED

How the BRIXO AI Lead Brief Maps to This Checklist

BrixFit's BRIXO AI reads your lead's form answers and briefs you before the call. Here is which brief section answers which criterion, so you can score the lead without extra digging.

BRIXO Brief to Checklist Map

BRIXO brief section	Answers criterion
Stated goal + deadline mentioned	1. Goal Clarity
Urgency signals in their answers	2. Timeline
Occupation, lifestyle, past spending hints	3. Budget Readiness
Tone of answers, past coaching experience	4. Coachability
Form completion speed + detail level	5. Contact Responsiveness
"Who is this for" field	6. Decision-Maker

Read the brief, fill the scorecard, and you walk into the call knowing exactly who you are talking to. Coaches using this flow stop taking calls with cold leads entirely.

WORKED EXAMPLES

3 Worked Examples: Score These Leads

See the system in action. Three leads, three scorecards.

Example 1 - Priya, 34, wants fat loss

Criterion	Score	Why
Goal clarity	2	"Lose 10 kg before December, wedding in the family"
Timeline	2	"Want to start next Monday"
Budget readiness	2	"I have paid for coaching before, I know the range"
Coachability	1	Keen but nervous about giving up late-night snacks
Responsiveness	2	Replied within an hour, form fully filled
Decision-maker	2	Decides herself
TOTAL	11	HOT - book the call this week

Example 2 - Rahul, 28, "just exploring"

Criterion	Score	Why
Goal clarity	1	"Get in shape, build some muscle" - no deadline
Timeline	0	"Maybe in 2-3 months, just researching now"
Budget readiness	1	"Depends on the price"
Coachability	1	Open, asks decent questions
Responsiveness	1	Replies next day
Decision-maker	2	Decides himself
TOTAL	6	WARM - nurture, do not pitch yet. Send value, follow up in 30 days

Example 3 - Anonymous Instagram DM

Criterion	Score	Why
Goal clarity	0	"Send diet chart" - no goal stated
Timeline	0	No timeline
Budget readiness	0	Wants everything free
Coachability	0	Argued with your last three replies
Responsiveness	1	Replies fast, but one-word answers
Decision-maker	1	Unknown
TOTAL	2	COLD - send the polite decline, protect your calendar

TIP

Notice how fast this is. Two minutes per lead, and Example 3 never touches your calendar.

MIXED SCORES

Handling Mixed Scores

Not every lead is cleanly hot or cold. Rules for the messy middle:

- Budget is the only 0 that matters most. A lead scoring 0 on budget readiness almost never converts, no matter how hot the rest is. Nurture, do not pitch.

- Coachability 0 is a hard no. An uncoachable client costs you more than they pay - in time, energy, and bad reviews.
- Timeline 0 + everything else hot = future client. Put them in a 30/60/90-day nurture sequence and move on.
- When in doubt, take the call but time-box it to 15 minutes. Some warm leads surprise you.

BEFORE THE CALL

The 2-Minute Pre-Call Routine

Do this before every single call. It is the difference between winging it and closing.

- ☐ Open the BRIXO AI lead brief and read it fully (60 seconds)
- ☐ Fill the scorecard above - circle the total (30 seconds)
- ☐ Write their #1 goal in their exact words (15 seconds)
- ☐ Write the one objection you expect and your one-line answer (15 seconds)

Walk in prepared and the call runs itself.

Pre-Call Prep Sheet

Fill one per lead. Takes 2 minutes with the BRIXO brief open.

WRITE YOUR ANSWERS BELOW

Lead name: _____ Date of call: _____

Goal clarity (0-2): ____

Timeline (0-2): ____

Budget readiness (0-2): ____

Coachability (0-2): ____

Responsiveness (0-2): ____

Decision-maker (0-2): ____

TOTAL: ___ / 12 Lead type: Hot / Warm / Cold (circle one)

Their #1 goal in their words: _____

Their #1 objection will probably be: _____

My opening line for the call: _____

Weakest criterion and how I will address it: _____

Follow-up planned if they say "I need to think": _____

BRIXFIT

ABOUT BRIxFIT

Start free on BrixFit

BrixFit is the all-in-one coaching-business platform for fitness coaches — lead CRM, coaching delivery, client progress, communication and AI assistance in one place.

START FREE — NO CREDIT CARD

- ✓ Lead CRM 100% free with unlimited leads (limited-time offer)
- ✓ Free plan: up to 3 active clients, no credit card
- ✓ Custom forms with conditional logic, Board / List / Grid lead views, n8n automation
- ✓ Workout + nutrition builders with 10M+ food database and 1500+ exercise library
- ✓ 5 BRIXO Lead Intel + 3 AI Health Insights free every month
- ✓ Free done-for-you migration from any platform. No lock-in.

Start free at brixfit.app

Or book a free walkthrough — we will set it up with you.