

FOR FRACTIONAL CFOS

The Fractional CFO \$5K Client Qualification Questions

the 7 questions that separate real clients from price shoppers.

The exact questions top fractional CFOs use to identify high-value clients fast — **without wasting time on bad-fit calls, price shoppers, or low-level bookkeeping work.**

HOW TO USE THESE QUESTIONS

This is not a sales script. it's a qualification framework.

- Identify serious buyers faster
- Filter out weak-fit clients early
- Protect your calendar and pricing power

you're not trying to convince everyone.

- Use during discovery calls
- Use inside your lead form
- Use before proposal conversations

strong CFOs don't take more calls - they take better ones.

THE QUALIFICATION QUESTIONS · 7 FILTERS

1 "What's creating the most financial pressure right now?"
is the pain real - and urgent?

STRONG ANSWERS SOUND LIKE

- "Cashflow visibility is inconsistent."
- "Margins are shrinking."
- "Growth is creating operational pressure."

× **Weak:** "Just looking around." · "Wanted to see pricing." · "Not sure yet."

→ No pressure means no urgency. Strong buyers can name the pain — and they value clarity around it.

2 "How are financial decisions being made today?"
read their leadership maturity.

STRONG ANSWERS SOUND LIKE

- "We need better forecasting."
- "Everything flows through me."
- "We're missing executive-level visibility."

× **Weak:** "Our bookkeeper handles most of it." · "Haven't really thought about it."

→ Strong CFO buyers understand that decision-making matters — not just record-keeping.

3 "What happens if nothing changes?"
surface the consequence.

STRONG ANSWERS SOUND LIKE

- "Growth will become harder."
- "Margins will keep tightening."
- "We're already feeling operational stress."

× **Weak:** "Nothing major." · "We're mostly okay."

→ No consequence means no urgency. Real buyers already feel the cost of inaction.

4 "What does growth look like over the next 12 months?"
are they actually scaling?

STRONG ANSWERS SOUND LIKE

- Hiring plans and expansion
- Operational scaling
- Increasing complexity

× **Weak:** Vague goals · Unclear direction · No growth plan

→ Strong operators think strategically — that's exactly where financial leadership becomes necessary.

5 "What financial visibility do you wish you had today?"
find the reporting gaps.

STRONG ANSWERS SOUND LIKE

- Cashflow forecasting
- Profitability & margin reporting
- Operational forecasting

× **Weak:** "Not sure." · "Whatever helps."

→ Businesses ready for a fractional CFO already know something is missing.

6 "Have you considered hiring a full-time CFO?"
test buying maturity.

STRONG ANSWERS SOUND LIKE

- "We've thought about it."
- "Not ready for full-time."
- "We need leadership before payroll."

× **Weak:** "No idea." · "Never considered it."

→ This question instantly qualifies sophistication, budget awareness, and operational stage.

7 "What's the cost of staying where you are?"
reframe finance as leverage.

STRONG ANSWERS SOUND LIKE

- Slower growth & hiring mistakes
- Margin pressure & operational chaos
- Delayed, lower-quality decisions

× **Weak:** "Not sure." · "No major issues."

→ Strong buyers understand that inaction is expensive — financial leadership is leverage, not an expense.

WHAT STRONG \$5K BUYERS HAVE IN COMMON

They feel it before you say a word.

- Already feel financial pressure
- Experiencing operational complexity
- Need real visibility
- Are making bigger decisions

filter early. qualify aggressively.

WHY THIS MATTERS

Most fractional CFOs don't have a lead problem. *they have a qualification problem.*

WEAK-FIT BUYERS USUALLY:

- × Want bookkeeping
- × Want cheap support
- × Are too early operationally
- × Shop on price

STRONG-FIT BUYERS ALREADY:

- Feel financial pressure
- Need executive visibility
- Are scaling and adding complexity
- Make bigger, heavier decisions

you don't take more calls - you take better calls.

WANT HELP ATTRACTING HIGHER-VALUE CLIENTS —

we'll find where weak-fit leads enter your pipeline.

Apply for a Fractional CFO Strategy Session

DESIGNED SPECIFICALLY FOR:

- Fractional CFOs and strategic finance advisors
- Operators moving beyond low-ticket accounting work
- Advisors ready to raise retainers and qualify harder

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We'll identify where weak-fit leads are entering your pipeline, what's reducing conversion quality, and how to attract better advisory clients without chasing or discounting.

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