Lead Management Checklist

You spend a lot of time, energy, and money doing lead generation to capture leads but, it's how you manage them that makes the difference between success and failure. This lead management checklist will help you better manage your leads once you get them and give you the best chance of success. Ask yourself the following questions:

Lead Capture:

- ☐ Are all your leads going into a centralized database for ongoing qualification and nurturing?
- ☐ Is there a "thank you" email setup to reply to each completed lead form and landing page?
- ☐ Are your leads synchronized with your CRM, marketing automation, and email systems?
- ☐ Are you prepared to review and follow-up on leads within 24 hours?
- ☐ Do you customize "thank you" emails based on their interest?

Read Lead Capture Optimized: 201% Increase in Leads with Clearer Value Proposition

Lead Qualification:

- ☐ Do you have a clear process to "qualify" each lead before sending them to your salespeople?
- ☐ Have you worked with sales on the questions to ask to determine if leads are qualified?
- ☐ Are you using a Universal Lead Definition (ULD) to qualify each lead before sending to sales?
- ☐ Do you have a basic lead scoring approach setup and is it built on your universal lead definition?
- ☐ Are you asking qualifying questions and progressively profiling your leads?
- ☐ Do you have a process in place for distributing qualified leads to sales within 24 hours or less?
- ☐ Can your team access all lead information quickly and do they have all the information they need to follow-up?
- ☐ Have you agreed on what information you need to route qualified leads to the right salesperson?

Read Into Lead Generation: How to Determine if a Lead is Qualified

Lead Nurturing:

- ☐ Do you have an ongoing process in place to nurture or cultivate not-yet-ready leads?
- ☐ Does your company have a lead nurturing program to develop longer-term leads?
- ☐ Do you know what messages and content to send as part of your lead nurturing program?
- ☐ Are you using personas or empathy maps to know what content and messages to send?
- ☐ Have you identified the nurturing content you'll use to help leads progress (from being interested towards to wanting to talk to a sales rep?)
- ☐ Do you know how often to contact your leads with nurturing and the best channels you'll use?

Read Lead Nurturing: 4 Steps to Walking the Buying Path with Your Customers

Measurement:

- ☐ Do you have a process in place to measure and track leads generation, nurturing, ansales follow-up and pipeline contribution?
- ☐ Can you determine your cost per qualified lead, cost per opportunity, and cost per sale?
- ☐ Do you know which lead generation channels produce the highest ROI?
- ☐ Do you know which nurturing content was most helpful?
- ☐ Can you prove to your CEO that your lead generation is making a real impact?

Read 6 Metrics That Will Get You an Edge and Your CEO Clarity

Lead Management Process Flow

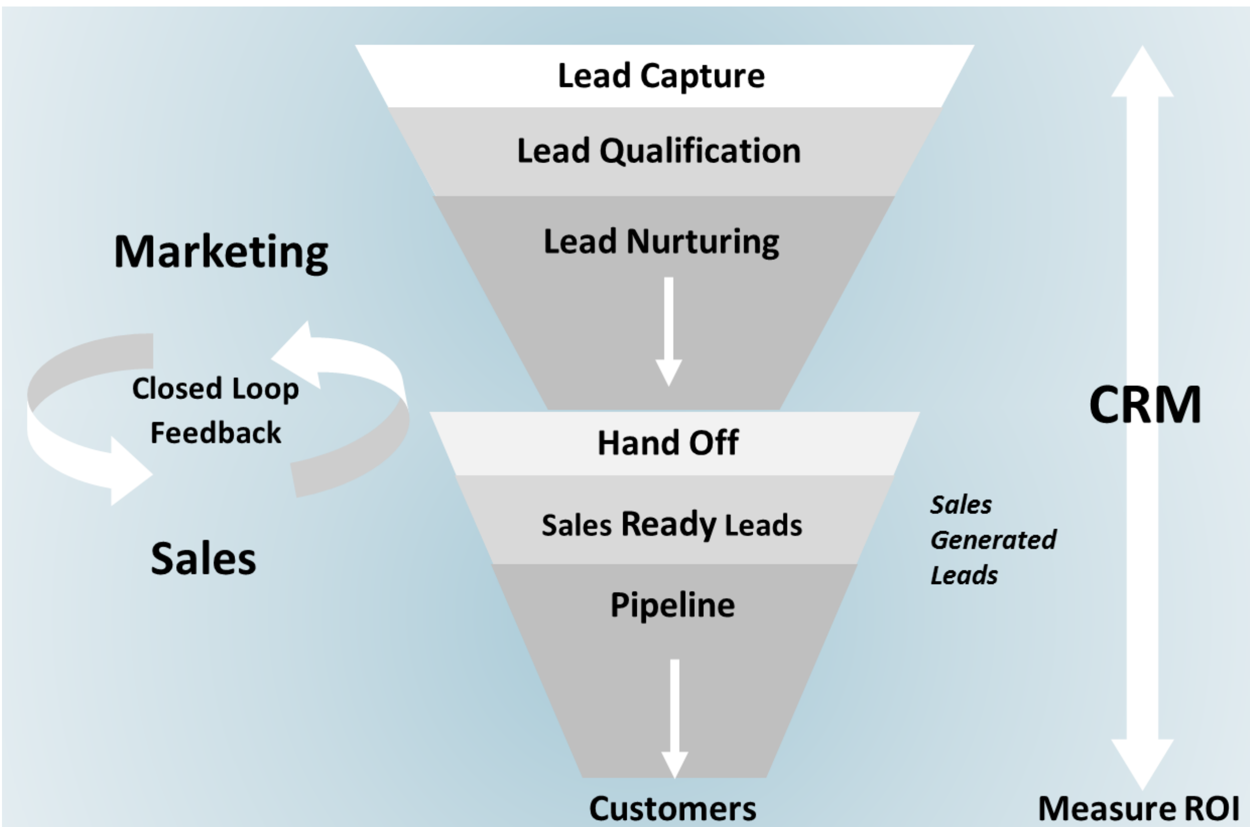

Figure 1.1 Lead management process map. Adapted from *Lead Generation for the Complex Sale (McGraw-Hill) by Brian Carroll*