Lead Generation Checklist

Efficient and Intentional Lead Management
To Get Better Results Now
For over 20 years, I've personally tested the best ways to increase the quality and quantity of leads while working with hundreds of companies and coaching marketers through the process. This work gave me a huge opportunity to measure, analyze, and test to know what works best to increase results now.

I’ve been in your shoes. You spend time, energy, and money to generate demand and get leads. It’s how you manage them that makes the difference between success and failure.

This checklist gives you an easy way to focus on the most critical tasks to set yourself up on the right track and begin getting better results.

- Brian Carroll

[LinkedIn]  [B2B Lead Blog]  [B2B Lead Roundtable]
We spend of time, energy, and money doing lead generation to capture leads, but it's how we manage them that makes the difference between success and failure. This lead generation checklist will help you better manage your leads and give you the best chance of success.

**Lead Capture:**

- Are all of 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 captured leads with a better value proposition](#)

**Lead Qualification:**

- Do you have a process to "qualify" each lead before sending them to your salespeople?
- Have you worked with sales on the questions to ask to determine if each lead is qualified?
- Are you using a Universal Lead Definition (ULD) to qualify leads before sending them on to sales?
- Do you have a basic lead scoring approach set up, 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?

Check out [Intro to 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 journey maps to understand what content and messages to send?
- Have you identified the nurturing content you'll use to help leads progress go from passive interest 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 [Four steps to do lead nurturing that helps the buying journey](#)
Measurement:

- Do you have reports in place to measure and track lead generation, nurturing, and sales 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 helps customers progress on each step of the buying journey?
- Can you prove to your CEO that your lead generation is making a real impact?

The Most Important B2B Marketing Metrics for CEOs

Lead Management Process Flow

Figure 1.1 Lead management process map. Adapted from *Lead Generation for the Complex Sale* (McGraw-Hill) by Brian Carroll
Discover how empathy can impact your marketing results

Watch my on-demand webinar, "How to improve demand generation with empathy."

Watch now

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