You spend a lot of time, energy, and money doing lead generation to capture leads but, it is how well your sales team engages them that can drive success and failure. This lead routing checklist will help you efficiently improve the handoff process to give you the best chance of success.

Lead Processing:

☐ Are all your leads going into a centralized database for qualification and nurturing?
☐ Are your leads synchronized with your CRM, marketing automation, and email systems?
☐ Have you worked with sales to open and follow-up on marketing leads within 24 hours?
☐ Did you get buy-in from your sales team on the criteria and when to hand off leads?
☐ Do you provide qualification and contact information sales needs for each sales lead?
☐ Have you documented your lead handoff process with roles/accountabilities defined?

Lead Qualification:

☐ Have you centralized your lead qualification process?
☐ 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?
☐ Do you use a Universal Lead Definition (ULD) to qualify leads prior handing off to sales?
☐ Is your lead scoring approach built upon your universal lead definition?

Lead Routing:

☐ Are you able to qualify and distribute sales ready leads immediately with your CRM?
☐ Have you agreed on what information you need to route leads to the right salesperson?
☐ Do you communicate lead handoff to each salesperson using automated rules?
☐ Have you worked with sales management to audit and track sales rep follow-up?
☐ Can you measure sales pursuit on leads? (Can leads be pulled or reassigned?)
☐ Do you train salespeople on how to follow-up and give you closed-loop feedback?
☐ Are you getting feedback from the sales team on marketing-generated leads?
☐ Do you have a process in place for distributing leads to sales within 24 hours or less?
☐ Can your team access all lead information quickly?
☐ Do you share best practices on lead follow-up across the sales team?

Additional Resources:

[Read Lead Capture Optimized: 201% Increase in Leads with Clearer Value Proposition](#)
[Read Into Lead Generation: How to Determine if a Lead is Qualified](#)