

# Lead Generation - Template V. 2.1



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Evaluation Copy!

## 1. Introduction

### 1.1. Document Objective

This document describes a sales lead generation program. Leads are entities with a potential of becoming paying customers. Lead generation programs employ a combination of marketing tools that aim to discover and qualify prospective customers.

## 2. Sales Generation Overview

### 2.1. Section Objective

This section provides an explanation of the lead generation phase within the customer attainment process.

### 2.2. Customer Attainment Process

Generating leads is one component of an overall customer attainment process that is comprised of four inter-linked stages:

- List
- Lead
- Prospect
- Customer

*<Comment: In the first stage a "bulk list" was generated. The generation the "bulk list" is a part of another process. The "bulk list" is culled by applying qualifiers to create a "targeted list" of entities (individuals or companies) that have a potential of becoming customers. The "targeted list" is therefore comprised of qualified Leads.*

*A qualified Lead can be defined according to various criteria such as: industry, type of company, position, or their market problem.*

*Through marketing efforts, Leads are converted into Prospects. A Prospect is an entity from the targeted list of Leads that the company has made contact via various efforts.*

*As the process moves into the "Lead" phase, the initial step must be to define the strategic objectives of the "Lead Generation Program".>*

## 3. Lead Generation Program

### 3.1. Section Objective

This section describes the elements that make an effective lead generation program. An effective lead generation plan will result in a new list of quality leads that have the greatest potential to convert to revenue generating customers.

### 3.2. Lead Generation Program

Lead generation program is made of the following elements:

#### 3.2.1. Strategy Formulation

##### 3.2.1.1. Market Problem

- <Describe the market problem customers are trying to solve.>
- 3.2.1.2. **Program Objectives**  
<Clearly state the lead generation program's objectives.>
- 3.2.1.3. **Target List**  
<Define the target audience and verify it is within the "targeted list".>
- 3.2.1.4. **Medial Channels**  
<Choose and list the media channels (web, mail, phone, or events) that will be employed.>
- 3.2.2. **Action Plan**
- 3.2.2.1. **Media Per Channel**  
<Select and list media tools for each media channel (direct mail piece, advertisement, or brochure).>
- 3.2.2.2. **Media Tools Alignment**  
<Build for each media tool the lead generation offer and/or enticement.>
- 3.2.2.3. **Media tools CFA**  
<Determine the appropriate "Call For Action" (CFA) for each media tool. Factor into the selected media tools the appropriate CFA.>
- 3.2.2.4. **Lead Handling**  
<Create, review and approve an internal process for handling and distributing incoming leads.>
- 3.2.2.5. **Program Metrics**  
<Select and list overall program metrics and criteria, such as lost deals, closed deals, and revenue.>
- 3.2.2.6. **Company Preparedness**  
<Create the call scripts and training plan relevant to telemarketers, salespeople, and account managers.>
- 3.2.2.7. **Timeline**  
<Create the program's schedule of events or tasks.>
- 3.2.3. **Pilot Program**
- 3.2.3.1. **Pilot**  
<Select and list the test audience and success criteria. Execute a small scale pilot and make corrections.>
- 3.2.3.2. **Project Scope**  
<Ascertain and note the scope, duration, resources, and budget needed for the full lead generation program.>
- 3.2.3.3. **Reschedule**  
<Make adjustments to the lead generation program timeline.>
- 3.2.4. **Preparation Phase**
- 3.2.4.1. **Lead Qualification**  
<Describe the lead qualification process. List the interview questions and criteria that will be used to qualify all incoming leads.>
- 3.2.4.2. **Lead Distribution**

<Describe the lead distribution process. Inform and explain this process to the sales force of.>

#### 3.2.4.3. **Analysis**

<Describe the metrics and the analysis process that will be used to gauge the program's merit.>

### 3.2.5. **Program Launch**

#### 3.2.5.1. **Lead Qualification**

<Launch the program. Write all incoming leads in a separate appendix to this document called "Incoming Leads".>

#### 3.2.5.2. **Lead Distribution**

<Allocate the incoming leads to the sales force. Write the details of incoming leads allocation in a separate appendix to this document called "Leads Allocation".>

#### 3.2.5.3. **Results and Conclusions**

<If relevant, declare the campaign has ended. Write the conclusions and results of the program in a separate appendix to this document called "Results and Conclusions".>

## 4. Supporting Data

### 4.1. **Section Objective**

The section provides data in support of claims, assertions, assumptions, and statements made throughout this document.

### 4.2. **Assumptions**

<Describe any assumptions made when writing this document.>

### 4.3. **Research Information**

<If relevant, describe and list the type and scope of research conducted in the course of writing this document.>

### 4.4. **Product Diagram/Architecture**

<If relevant, describe the product's architecture and modules accompanied by a schematic diagram.>