

# Blackblot® PMTK

## Lead Generation



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## 1. Introduction

### 1.1. Document Objective

This document outlines a structured approach to sales lead generation, defining processes, strategies, and key performance metrics. Lead generation initiatives employ various marketing tools to identify and qualify potential customers, ensuring alignment with business objectives.

*<Comment: Leads are entities with the potential to become paying customers. Lead generation programs employ a combination of marketing tools to discover and qualify prospective customers.>*

## 2. Sales Generation Overview

### 2.1. Section Objective

This section provides a structured overview of the lead generation phase within the customer acquisition process.

### 2.2. Customer Attainment Process

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

- *Bulk List Creation* – An initial list of potential contacts is compiled based on available data sources.
- *Targeted List Development* – Qualifiers are applied to refine the bulk list, identifying leads that align with strategic goals.
- *Lead Engagement* – Through targeted marketing initiatives, leads are nurtured and evaluated for conversion potential.
- *Prospect Conversion* – Qualified leads that engage further with the company's offerings move toward sales conversion.
- *Customer Acquisition* – Prospects who complete the sales process become customers.

*<Comment: A "bulk list" is generated in the first stage. Obtaining the bulk list is part of another process. The bulk list is culled by applying qualifiers to create a "targeted list" of entities (individuals or companies) that have the potential to become 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 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 contacted 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 defines the critical components of an effective lead generation program, outlining key activities, tools, and success criteria. An effective lead generation plan will result in a new list of quality leads with the most significant potential to convert to revenue-generating customers.

### 3.2. Lead Generation Program

The 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. Clearly define the customer challenge that the product or service addresses.>

##### 3.2.1.2. Program Objectives

<Clearly state the lead generation program's objectives. Establish measurable goals for the lead generation initiative.>

##### 3.2.1.3. Target Audience List

<Define the target audience and verify it is within the "targeted list". Define the characteristics of the ideal customer profile and verify alignment with the targeted list.>

##### 3.2.1.4. Medial Channels

<Choose and list the media channels (web, mail, phone, or events) that will be employed. Identify and document the channels (e.g., digital, direct mail, phone outreach, events) that will be leveraged.>

#### 3.2.2. Action Plan

##### 3.2.2.1. Media Per Channel

<Select and list media tools for each media channel (e.g., email campaigns, advertising, brochures, direct mail piece, advertisement, or brochure). Specify the selected media tools per channel.>

##### 3.2.2.2. Media Tools Alignment

<Build for each media tool the lead generation offer and enticement.>

##### 3.2.2.3. Media Tools CTA

<Determine the appropriate "Call-To-Action" (CTA) for each media tool to drive engagement. Factor into the selected media tools the appropriate CTA.>

##### 3.2.2.4. Lead Handling Process

<Create, review, and approve an internal process for handling and distributing incoming leads. Establish internal protocols for managing, tracking, 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. Identify key performance indicators (KPIs), including lead-to-customer conversion rates and return-on-investment (ROI) analysis.>

##### 3.2.2.6. Company Preparedness

<Create the call scripts and training plan relevant to telemarketers, salespeople, and account managers.>

Develop sales scripts and training materials to equip relevant personnel.>

3.2.2.7. Timeline

<Create the program's schedule of events or tasks. Define the schedule of activities, ensuring alignment with campaign objectives.>

3.2.3. Pilot Program

3.2.3.1. Test Audience Selection

<Identify a small-scale test audience and establish success benchmarks. Select and list the test audience and success criteria.

3.2.3.2. Initial Program Execution

<Execute a small-scale pilot, gather feedback, and make corrections.>

3.2.3.3. Project Scope Adjustments and Refinements

<Ascertain and note the scope, duration, resources, and budget needed for the full lead generation program. Make adjustments to the lead generation program timeline. Modify the lead generation strategy based on pilot outcomes before full-scale implementation.>

3.2.4. Preparation Phase

3.2.4.1. Lead Qualification Criteria

<Establish a structured methodology to assess incoming leads based on predefined parameters. Describe the lead qualification process. List the interview questions and criteria used to qualify all incoming leads.>

3.2.4.2. Lead Distribution Protocols

<Develop a transparent allocation process for assigning leads to the appropriate sales personnel. Describe the lead distribution process. Inform and explain this process to the company's sales force.>

3.2.4.3. Performance Analysis Framework

<Define the metrics and methods for evaluating campaign effectiveness. 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 Execution

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

3.2.5.2. Lead Distribution Implementation

<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. Final Evaluation and Reporting

<Conclude the campaign and consolidate findings. If relevant, publically declare that 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

This section provides data supporting claims, assertions, assumptions, and statements made throughout this document.

##### 4.2. Assumptions

<Describe any assumptions made while preparing this document.>

##### 4.3. Research Information

<If relevant, describe and list the type and scope of research conducted while preparing this document.>

##### 4.4. Product Diagram/Architecture

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