Blackblot® PMTK

Lead Generation

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Table of Contents

1. **Introduction**

   1.1. **Document Objective**

   This document describes a sales lead generation program. 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 explains 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 interlinked stages:

   - List
   - Lead
   - Prospect
   - Customer

   <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 describes the elements that make an effective lead generation program. 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.>

   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 that 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 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 used to qualify all incoming leads.>
3.2.4.2.   Lead Distribution
<Describe the lead distribution process. Inform and explain this process to the company's sales force.>
3.2.4.3.   Analysis

<div style="text-align:center; color:blue;">
<Describe the metrics and the analysis process that will be used to gauge the program's merit.>
</div>

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
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.>