

TEMPLATE FOR GENERATING NEW LEADS

Use this template to identify your organization's lead generation activities.

1. Determine your target audience

Who do you consider your target audience? Identify their demographics, interests, behaviors, roles, and job responsibilities.

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2. Decide on your lead generation strategy

Based on your target audience, determine your lead generation strategy: inbound, outbound, or hybrid. Use the checklist below to identify how you will generate and source your leads.

	Inbound Lead Generation Tactics		Outbound Lead Generation Tactics
	Referrals		Purchasing Leads
	Content Marketing		Cold Calling
	Website Form Submission		Email Introductions
	Traditional Advertising		Networking Events
	Paid Search Advertising		Trade Shows
	Social Media Campaigns		
	Educational Seminars		

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3. Execute your tactic with solid messaging

List the lead generation tactics you've chosen above and identify the materials you need to execute your outreach.

Tactic	Required materials
Example: Cold calling	Develop a call script

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4. Initiate a call to action

After identifying your tactics and corresponding materials needed to execute it, create a call to action for each.







Tactic	Call to Action
Content Marketing	After a video, article, or podcast, let the audience know they can learn more by calling a certain number, emailing your business, or submitting a website form.

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5. Measure the effectiveness of your lead generation activities

After identifying your tactics and corresponding materials needed to execute it, create a call to action for each.

MEASURING LEAD GENERATION EFFECTIVENESS

 Sales Qualifying Lead Rate (SQL)	 Actionable Lead Rate	 Cost Per Engagement	 Cost Per Lead	 Total Return on Investment (ROI)	 Lead to Sales Ratio (Closing Rate)
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Tactic	Success Rate

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6. Constantly review your strategy & adjust as needed

Based on the success rate of your tactics, identify the best and least performing activities and focus more on the ones that help you generate the most leads.

Top Performing Lead Generation Activities	Least Performing Lead Generation Activities