Gartner
Lead Management Discovery Meeting
6/11/2014

1. Database
   a. Systems – marketing database, SFA, CRM, TM, etc.
   b. Integration process
   c. Data model defined
   d. Relationship of channel, inside sales, sales management, product types, national accounts, etc. to leads
   e. Number of records
   f. Overall data consistency and completeness
   g. Record contact history
   h. Information captured
      i. Basic contact
      ii. Additional contact fields
      iii. Company relationship
      iv. Source of each lead is captured
      v. Product interest is captured
      vi. Requested literature is captured
      vii. Rep/management assignment
      viii. Additional screening information -- competitors, application, industry, timing, etc.
      ix. Lead status is captured
      x. Notes (opening, telemarketing, sales rep) are captured
      xi. Sales potential or quote information (product, $s, dates, etc.)
   i. Data import/export processing rules defined
   j. Ongoing data capture
   k. Accessibility -- sales, marketing and channel
   l. Integration with other systems – technology stack

2. Target Markets
   a. Existing customer mapping
   b. Selection and counts by industry, sector and segment
   c. Contact vs location data
   d. Prioritization definition criteria and counts
   e. Territory playbooks

3. Sales and Marketing Alignment
   a. Scoring model/attributes
   b. Persona criteria established
   c. Sales process steps
   d. Lead status definitions
   e. Qualification criteria defining each status
   f. Fulfillment process
   g. Channel and prospect nurturing rules
   h. Lead distribution rules
   i. Feedback rules

We help companies **excite** markets, **engage** customers, **effect** sales & **embed** value.

          j.   Service level agreements

4. Current lead handling process
    a. Annual quantity of leads from:
        i. Web site(s)
        ii. Digital marketing efforts
        iii. Events
        iv. Reps
        v. Channel
        vi. Other sources
    b. Assignment method
    c. Visually screening (type, profiles, etc.)
    d. Telequalification method
    e. Digital footprint tracking
    f. Escalation to salespeople
    g. Download or fulfillment timing and acknowledgement
    h. Poor, duplicate and competitor lead rules
    i. Personalized and product/application nurturing paths
    j. Lead notification for immediate attention
    k. Full lead information exchange
    l. Lead update method
    m. Adding a new lead method
    n. Ongoing communication plan
    o. Survey of contacts

5. Personas
    a. What are the definitions
    b. Content and digital assets associated with each
    c. Assignment rules pertaining to personas
    d. Title to persona mapping

6. Metrics and reporting
    a. State of the database
    b. Qualification process
    c. Sales follow up activity
    d. Quote and active lead activity
    e. Media effectiveness are produced/used
    f. Summary of contact feedback