next8n

SOP: LEAD GENERATION VA

Workflow Automation Delivery Framework

ENTERPRISE EDITION

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SOP: Lead Generation VA

Standard Operating Procedure for Lead Sourcing & Initial Outreach

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Role Overview

Title: Lead Generation Virtual Assistant
Reports To: Sales Manager / Agency Owner
Hands Off To: Sales Representative

Primary Objective:
Source, qualify, and warm up potential leads for the sales team.

Daily Tasks

Morning Routine (First Hour)

```
Check CRM for overnight inquiries
Review email for any lead responses
Update lead tracking spreadsheet
Check LinkedIn for new connections/messages
Review daily lead quota
Plan sourcing activities for the day
```

Core Activities

```
1. LEAD SOURCING (3-4 hours)
    Research target companies
    Find decision makers
    Collect contact information
    Log in lead database

2. OUTREACH (2-3 hours)
    Send personalized messages
    Follow up on previous outreach
    Engage on social media
    Handle responses

3. ADMINISTRATION (1 hour)
    Update CRM/spreadsheets
    Report to team
    Organize tomorrow's tasks
```

Lead Sourcing Procedure

Step 1: Identify Target Companies

```
IDEAL CLIENT PROFILE:

Company Size: [Define - e.g., 10-500 employees]
Industry: [Define - e.g., SaaS, E-commerce, Agency]
Location: [Define - e.g., US, UK, AU]
Tech Stack: [Define - e.g., uses HubSpot, Salesforce]
Pain Indicators:
  - Hiring for automation roles
  - Mentions automation in job posts
  - Uses multiple SaaS tools
  - Growing rapidly
```

Step 2: Find Decision Makers

```
TARGET TITLES:
Primary:
  - CEO / Founder
  - COO / Operations Director
  - Head of Operations
  - Director of Technology

Secondary:
  - VP of Sales
  - Head of Marketing
  - Director of Customer Success

RESEARCH TOOLS:
  - LinkedIn Sales Navigator
  - Apollo.io
  - ZoomInfo
  - Company websites
  - Crunchbase
```

Step 3: Collect Information

```
FOR EACH LEAD, GATHER:

 Full name
 Title/Role
 Company name
 Company website
 LinkedIn URL
 Email address
 Phone (if available)
 Company size
 Industry
 Tech stack (if visible)
 Recent news/triggers
 Notes (personalization points)
```

Step 4: Log in Database

```
CRM ENTRY REQUIREMENTS:

Required Fields:
  - First name
  - Last name
  - Email
  - Company
  - LinkedIn URL
  - Source (where found)
  - Date added

Optional Fields:
  - Phone
  - Title
  - Company size
  - Industry
  - Notes
  - Personalization angle
```

Outreach Procedure

Initial Connection Request (LinkedIn)

```
TEMPLATE (Personalize):

Hi [First Name],

[Personalization - recent post, company news, mutual connection]

I help [industry] companies automate [specific process]
to save time and reduce manual work.

Would love to connect!

[Your Name]

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PERSONALIZATION EXAMPLES:

"Loved your post about scaling ops..."
"Congrats on the recent funding round..."
"Noticed [Company] is expanding rapidly..."
"Saw you're using [Tool] - we integrate with that..."
```

Follow-Up Message (After Connection)

```
TEMPLATE:

Hi [First Name],

Thanks for connecting!

Quick question - is [Company] currently automating any of your
repetitive workflows, like [specific example relevant to them]?

We've helped similar [industry] companies save 10-20 hours/week
with smart automation.

Happy to share some examples if helpful.

[Your Name]
```

Email Outreach

```
SUBJECT LINES (Test and rotate):
- "Quick question about [Company]'s operations"
- "[Mutual Connection] suggested I reach out"
- "Automation idea for [Company]"
- "Saw [Company] is growing - congrats!"

_____________________________________________

EMAIL TEMPLATE:

Subject: Quick question about [Company]'s operations

Hi [First Name],

[Personalization - 1-2 sentences showing you researched them]

I'm reaching out because we help [industry] companies like
[Company] automate repetitive workflows - things like:

• [Specific example 1]
• [Specific example 2]
• [Specific example 3]

Most of our clients save 10-20 hours per week and eliminate
manual errors.

Would it make sense to chat for 15 minutes to see if there's
a fit?

[Your Name]
[Title]
[Company]
```

Lead Qualification

Qualifying Questions (If They Respond)

```
QUESTIONS TO ASK:

1. "What repetitive tasks take up most of your team's time?"
2. "Are you currently using any automation tools?"
3. "What systems/tools does your team use daily?"
4. "What would solving this problem be worth to you?"
5. "Who else is involved in decisions like this?"
```

Qualification Criteria

```
QUALIFIED LEAD (Pass to Sales Rep):
[x] Has clear pain point
[x] Has budget authority or access
[x] Expressed interest in call
[x] Matches ideal client profile
[x] Responded positively

NOT QUALIFIED (Keep nurturing or discard):
[ ] No budget
[ ] No authority
[ ] Not interested
[ ] Wrong industry/size
[ ] Already has solution
```

Handoff to Sales Rep

```
HANDOFF MESSAGE TO SALES REP:

New Lead: [Name] at [Company]

SUMMARY:
- How sourced: [LinkedIn/Email/Referral]
- Pain points mentioned: [Details]
- Tools they use: [List]
- Interest level: [High/Medium]
- Best contact: [Email/Phone/LinkedIn]

CONVERSATION HISTORY:
[Paste relevant messages]

SUGGESTED NEXT STEP:
[Your recommendation]

_____________________________________________

ALSO UPDATE CRM:
 Change status to "Qualified"
 Assign to Sales Rep
 Add conversation notes
 Set follow-up date
```

Tracking & Reporting

Daily Metrics

```
DAILY TRACKING:

| Metric | Target | Actual |
|--------|--------|--------|
| New leads sourced | 20 | |
| Outreach messages sent | 30 | |
| Responses received | 5 | |
| Connections made | 10 | |
| Leads qualified | 2 | |

TIME SPENT:
| Activity | Hours |
|----------|-------|
| Sourcing | |
| Outreach | |
| Admin | |
| Total | |
```

Weekly Report

```
WEEKLY REPORT TEMPLATE:

Week of: [Date]

METRICS:
- Leads sourced: X
- Outreach sent: X
- Responses: X (X% response rate)
- Qualified leads: X
- Handed to Sales: X

TOP LEADS THIS WEEK:
1. [Name] at [Company] - [Why promising]
2. [Name] at [Company] - [Why promising]
3. [Name] at [Company] - [Why promising]

OBSERVATIONS:
- [What's working]
- [What's not working]
- [Suggestions]

NEXT WEEK FOCUS:
- [Priority 1]
- [Priority 2]
```

Tools & Access

Required Tools

```
 LinkedIn (Sales Navigator preferred)
 CRM access (HubSpot, Pipedrive, etc.)
 Email outreach tool (if used)
 Lead database (Apollo, ZoomInfo, etc.)
 Team communication (Slack)
 Tracking spreadsheet
```

Login Management

```
SECURITY RULES:
- Use unique passwords
- Enable 2FA where possible
- Never share login credentials
- Log out when done
- Use password manager
```

Do’s and Don’ts

Do’s

```
 Personalize every message
 Research before reaching out
 Follow up consistently (3-4 touches)
 Log everything in CRM
 Stay organized
 Ask qualifying questions
 Hand off warm leads quickly
 Report issues immediately
```

Don’ts

```
 Send generic spam messages
 Lie or exaggerate
 Make promises you can't keep
 Argue with uninterested leads
 Skip CRM updates
 Hoard leads (hand off when qualified)
 Give pricing information
 Schedule calls (let Sales Rep do this)
```

Escalation

When to Escalate

```
ESCALATE TO SALES MANAGER:

- Unusually large opportunity
- VIP/celebrity lead
- Competitor inquiry
- Confused about qualification
- Tool/access issues
- Lead complaints
```

Quality Checklist

```
BEFORE MARKING LEAD AS QUALIFIED:

 Contact information verified
 Company matches ICP
 Decision maker or influencer
 Clear pain point identified
 Interest in conversation confirmed
 All CRM fields completed
 Conversation notes added
 Assigned to correct Sales Rep
```

Next: See `02-sop-sales-rep.md` for Sales Representative procedures.

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