

Lead Management Process | **Template**

Lead Stage (Examples)	Definition	Team	Activities to be Conducted by Team	Exit Criteria
Suspect	Sufficient data exists for individual to be in CRM, but not enough known for Marketing or Sales to target them.	Marketing	<ul style="list-style-type: none"> Marketing outreach via emails and ads. Update profile as new data is acquired. Score/grade profile as new updates occur. 	<ul style="list-style-type: none"> Individual is aware of Company. Lead takes action to provide enough information to show that they are a potential customer through activity, demographic, and firmographic info.
Prospect	<p>“Hand-raisers” who convert from an offer, but further qualification needed for a sales conversation.</p> <p>And/or</p> <p>Lead targeted by Marketing based on persona and firmographic data.</p>	Marketing	<ul style="list-style-type: none"> Continued marketing outreach via emails, ads, and other channels. Score leads to prioritize qualification and readiness. 	<ul style="list-style-type: none"> Lead meets Lead Qualification Score threshold based on account, persona, and behavioral scores. <p>Or</p> <ul style="list-style-type: none"> Fill out Contact Us form with propensity for demo or buy. <i>TBD: Need temporary minimal qualification or classification to further qualify submissions until we gate content.</i>
Marketing Qualified Lead	<p>An inbound-generated lead who – through activity or indicated interest – warrants a prompt call from Sales Development.</p> <p>Or</p> <p>An outbound-generated lead who through sales development activity has indicated interest in learning more.</p>	BDR	<ul style="list-style-type: none"> BDR begins calling leads within X time of becoming MQL. Leads prioritized through lead score, behavioral activity, job title, and account data. BDR attempts to qualify through BANT criteria and schedule demo. 	<ul style="list-style-type: none"> Lead meets BANT qualification. Intro call with AEs and member of the buying team scheduled.
Sales Accepted Lead	BDR determines the individual is part of the buying team and has scheduled the intro call.	BDR/AE	<ul style="list-style-type: none"> Account executive, BDR, and lead participate in call to understand needs and opportunity. Account executive confirms that lead meets opportunity criteria or rejects with appropriate reason. 	<ul style="list-style-type: none"> Based on conversation, AE confirms that lead is a fit and worth pursuing in an opportunity management process.
Sales Qualified Lead (Opportunity)	Company expresses desire to engage in buying decision. AE deems as worthy of their time and creates deal in HS.	AE	<ul style="list-style-type: none"> AE creates opportunity in CRM and begins opportunity management process. Sales process tracked on deal record until it is closed. Ensure appropriate contacts are associated to opportunity. 	<ul style="list-style-type: none"> Deal becomes Closed Won (Customer) or Closed Lost (Nurture)
Customer	Any contact in CRM that has purchased	Sales & CS	<ul style="list-style-type: none"> Pursue upsell/expansion opportunities. Continue account renewal processes. Segment based on customer whitespace. 	<ul style="list-style-type: none"> N/A



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Suspect	<i>[How do you define a lead that is at this stage? What high-level indicators are there that help to know why a lead is at this stage?]</i>	<i>[What team owns and acts on these leads?]</i>	<i>[What activities should be done by the team that owns this lead?]</i> • List of Activities	<i>[What needs to happen or what criteria needs to be met for a lead at this stage to move to the next stage?]</i> • List of Criteria
Prospect	<i>[How do you define a lead that is at this stage? What high-level indicators are there that help to know why a lead is at this stage?]</i>	<i>[What team owns and acts on these leads?]</i>	<i>[What activities should be done by the team that owns this lead?]</i> • List of Activities	<i>[What needs to happen or what criteria needs to be met for a lead at this stage to move to the next stage?]</i> • List of Criteria
Marketing Qualified Lead	<i>[How do you define a lead that is at this stage? What high-level indicators are there that help to know why a lead is at this stage?]</i>	<i>[What team owns and acts on these leads?]</i>	<i>[What activities should be done by the team that owns this lead?]</i> • List of Activities	<i>[What needs to happen or what criteria needs to be met for a lead at this stage to move to the next stage?]</i> • List of Criteria
Sales Accepted Lead	<i>[How do you define a lead that is at this stage? What high-level indicators are there that help to know why a lead is at this stage?]</i>	<i>[What team owns and acts on these leads?]</i>	<i>[What activities should be done by the team that owns this lead?]</i> • List of Activities	<i>[What needs to happen or what criteria needs to be met for a lead at this stage to move to the next stage?]</i> • List of Criteria
Sales Qualified Lead (Opportunity)	<i>[How do you define a lead that is at this stage? What high-level indicators are there that help to know why a lead is at this stage?]</i>	<i>[What team owns and acts on these leads?]</i>	<i>[What activities should be done by the team that owns this lead?]</i> • List of Activities	<i>[What needs to happen or what criteria needs to be met for a lead at this stage to move to the next stage?]</i> • List of Criteria
Customer	<i>[How do you define a lead that is at this stage? What high-level indicators are there that help to know why a lead is at this stage?]</i>	<i>[What team owns and acts on these leads?]</i>	<i>[What activities should be done by the team that owns this lead?]</i> • List of Activities	<i>[What needs to happen or what criteria needs to be met for a lead at this stage to move to the next stage?]</i> • List of Criteria

