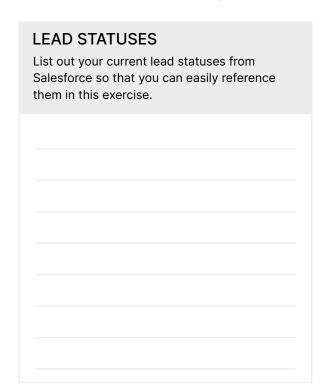


Lead Funnel

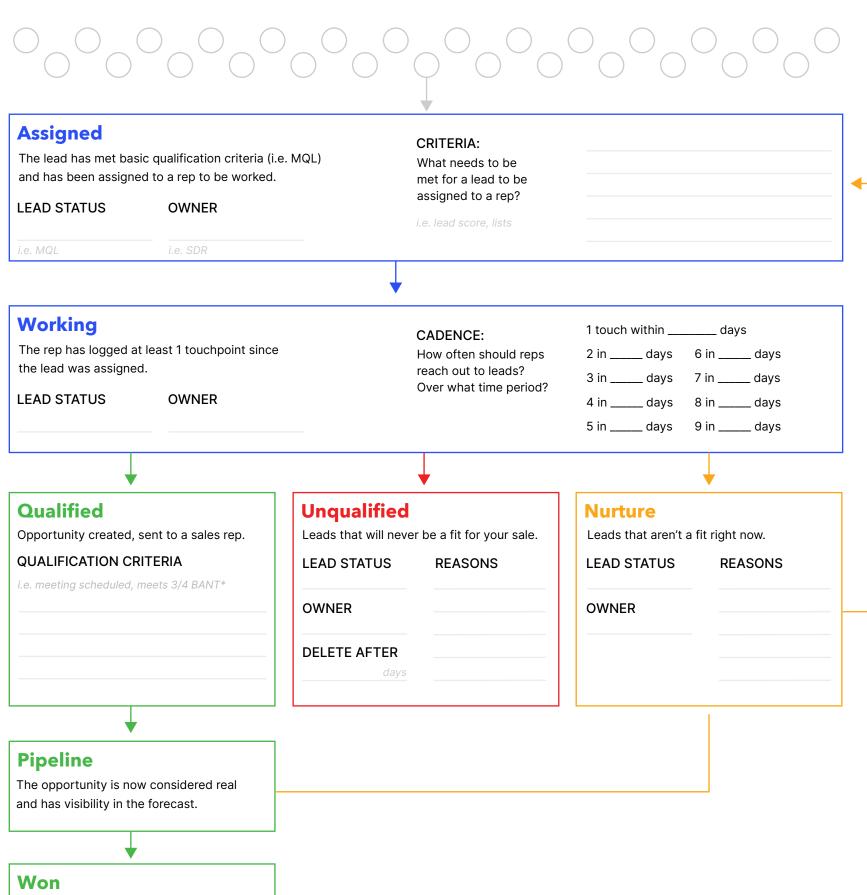
Connecting Salesforce, your teams and the full funnel together can help bring transparency and accountability from lead to revenue.

This worksheet represents your lead funnel. To complete it:

- 1. List your lead statuses and teams below.
- 2. Look at each funnel stage on the right of this worksheet and fill in the missing values.



TEAMS THAT TOUCH LEADS List out your teams that could own leads at any part of the funnel, like Marketing, Sales, and Customer Success.



Raw

The lead exists in your database, but isn't ready for a rep yet.

SYSTEM

OWNER

i.e. Automation or Salesforce

. Marketing

Recycled

Leads have been re-assigned to reps to be worked again after a nurture program.

CRITERIA TO BE RE-ASSIGNED

i.e. lead score, lists, cold lead queues

TIPS

Think about how to manage both leads and contacts in Salesforce.

Are your status names and reasons clear, unambiguous, and well defined?

There are many ways leads can be assigned - like queues, routing, cold pickup, etc.

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The opportunity is won.



Lead Handoffs

Handoffs are prime locations to lose leads because of ambiguous ownership and unclear expectations. Simple service level agreements and ownership definitions can create dramatic performance improvements by clarifying expectations within your funnel.

To complete this worksheet:

- 1. Identify who is responsible for each handoff.
- 2. Enter the criteria for each service level agreement.

Assigned to i.e. SDR

Leads are activated and assigned to a rep who needs to develop and qualify the lead.

RESPONSE TIME

TOUCHES TO QUALIFY

e. first touch in 20 minutes

i.e. 10 touches

PICK-UP RATE

QUALIFIED / WEEK

90% worked in 24 hours i.e. 5 opps handed off to Al

Assigned to i.e. AE

Leads have a qualified opportunity and are being managed as pipeline and worked to closed won.

ACCEPT/REJECT WINDOW

i.e. rep must accept/reject within 24 hours of a disovery call

REJECT REASON(S)

HANDOFF

HANDOFF

LEAD LIFECYCLE →

RAW LEAD

LEAD ACTIVATION

LEAD DEVELOPMENT

OPPORTUNITY MANAGEMENT

WON DEAL

i.e. database entry from a list upload, top of funnel interaction like a whitepaper download, target account lists, etc. i.e. Marketing is running programs to get the lead ready for a discussion, like webinars or tradeshows, to meet assignment criteria (such as becoming an MQL)

i.e. SDRs are working qualified leads or cold prospecting to ready them for sales conversations

i.e. AEs work deals to closed-won•

e Handoff to customer succes

HANDOFF

HANDOFF

Nurture

Prospects aren't ready to buy, but could be in the future – sent to marketing.

RE-ASSIGNMENT RULES

e. lead scoring, re-assignment after 6 months

OWNER

No Shows

Prospects that don't show up for meetings with AEs and need to be rescheduled by the SDR.

RECHEDULE ATTEMPTS

.e. 3 cancellations

RECHEDULE ATTEMPTS

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