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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.

LEAD STATUSES

List out your current lead statuses from Salesforce so that you can easily reference them in this exercise.

TEAMS THAT TOUCH LEADS

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

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Raw

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

SYSTEM
i.e. Automation or Salesforce

OWNER
i.e. Marketing

Assigned

The lead has met basic qualification criteria (i.e. MQL) and has been assigned to a rep to be worked.

LEAD STATUS
i.e. MQL

OWNER
i.e. SDR

CRITERIA:
What needs to be met for a lead to be assigned to a rep?
i.e. lead score, lists

Working

The rep has logged at least 1 touchpoint since the lead was assigned.

LEAD STATUS

OWNER

CADENCE:
How often should reps reach out to leads? Over what time period?

1 touch within ________ days

2 in _____ days

3 in _____ days

4 in _____ days

5 in _____ days

6 in _____ days

7 in _____ days

8 in _____ days

9 in _____ days

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

Qualified

Opportunity created, sent to a sales rep.

QUALIFICATION CRITERIA
*i.e. meeting scheduled, meets 3/4 BANT**

Unqualified

Leads that will never be a fit for your sale.

LEAD STATUS

REASONS

OWNER

DELETE AFTER
days

Nurture

Leads that aren't a fit right now.

LEAD STATUS

REASONS

OWNER

Pipeline

The opportunity is now considered real and has visibility in the forecast.

Won

The opportunity is won.

** BANT = Budget, Authority, Need, and Timeline*

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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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
i.e. first touch in 20 minutes

TOUCHES TO QUALIFY
i.e. 10 touches

PICK-UP RATE
i.e. 90% worked in 24 hours

QUALIFIED / WEEK
i.e. 5 opps handed off to AEs

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
i.e. database entry from a list upload, top of funnel interaction like a whitepaper download, target account lists, etc.

LEAD ACTIVATION
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)

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

OPPORTUNITY MANAGEMENT
i.e. AEs work deals to closed-won

WON DEAL
i.e. Handoff to customer success

HANDOFF

HANDOFF

Nurture

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

RE-ASSIGNMENT RULES
i.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
i.e. 3 cancellations

RECHEDULE ATTEMPTS