

LEAD GENERATION PROCESS

TARGET CLIENTS

If possible you will have a database of all clients and they will be labelled live, dormant, target.

This workflow relates to recruiting and nurturing targets.

Record company and individual contact details.

Also record the original source of the relationship (event, prospecting, referral etc).

Team members are assigned to individual contacts within the company but have visibility of who else is linked.

MARKETING

The marketing function must dovetail with the lead generation activity. All clients in the database will be given marketing tags so lists can be extracted for email marketing etc.

Within the database a marketing checklist would possibly include: social media links, marketing tags added, contacts added to email lists, case studies sent etc

CONTACT

Scheduled contact relates to the assigned surveyor proactively making contact with the target. This is recorded against the contact record and notes the date, contact type and sets a follow up date.

Unscheduled contact is also recorded if deemed relevant such as 'met at xxx event'.

No need to make it too detailed, just date, contact type and planned follow up.

