Lead Development Program Checklist

Company Name:_____   **Last Update:**_____

Instructions: This Checklist is a roadmap for building the prospect database, communication templates, and marketing collateral you will need to establish a lead development program. We suggest you delegate out the tasks to different individuals within your company. This will allow you to accelerate the build-out process and create camaraderie among your team. When finished with each step, highlight the check boxes and you will have a finalized **Lead Development**

√	Prospect Database Development	Due Date	Responsible	Comments
☐	Audit In-House Database/Prospect List			
☐	Identify "Pool" of Longer Term Leads			
☐	Import Leads into Centralized Database			
☐	Identify Buyer, Decision Maker, and Influencers			
☐	Obtain missing Contact Information			
☐	Continually track response to identify Qualified Leads			

Building a Prospect Database helps you to establish a "pool of longer-term leads" to develop and nurture into future sales.

√	Communication Templates	Due Date	Responsible	Comments
☐	Introductory "Nice to Meet You" Letter			
☐	Phone Call Scripts			
☐	Common Objections, Frequently Asked Questions			
☐	Sales Presentation			
☐	Pricing Sheet/Competitive Information			
☐	Thank You Cards/Gifts			
☐	Product Announcements			
☐	Proposal Template of Order Form			

Communication Templates help your sales team to inform prospects of company offerings and develop sales leads into qualified prospects.

√	Marketing Collateral	Due Date	Responsible	Comments
☐	Company Brochure			
☐	Product Brochures			
☐	Industry Articles & Whitepapers			
☐	Success Stories			
☐	List of References			
☐	Frequently Asked Questions			

Marketing Collateral helps you build credibility by providing prospects useful information that positions you as a trusted supplier and industry expert.