Save Time & Close More Deals

17POINT

Lead Management Checklist For Small Business Owners

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Whether you purchase traffic or you've invested in content to draw visitors to your site organically, you likely pay a substantial amount of $ for each lead you capture.

That's why you need to maximize your chance of closing as many as possible.

Without a system or process in place your cost per acquisition (CPA) per customer increases. Your business can't afford to squander leads.

Here are 17 points to manage your leads that will help you maximize your close ratio:

1 Set Up a Sales Pipeline:

Ideally you'll sign up to a CRM and create stages in that pipeline. Each stage needs to be defined as a step in the process. Some of those steps may be automated (a follow up email), or some may be manual (a task to call your prospect). Your CRM should have a Kanban board view so you can visualize each deal and track their progression from start to finish.

2 Keep the Process Consistent:

This is related to #1. But it's worth emphasizing that you want to send all your deals through a relatively similar process. There are some exceptions (which we'll talk about in a moment). But the fewer Pipelines you can maintain, the simpler the process will be for you and your team. Consistency will lead to a higher close ratio. Training will be easier. And team buy-in will be greater.

3 Handle Cold (outbound) and Warm (inbound) leads separately:

This is one of the exceptions mentioned in #2. The process for cold outreach cannot always be as automated (i.e. in terms of emails), or may be best handled in a separate database. Depending on how your company organizes its sales effort, you may want to keep these in a separate pipeline or in a separate CRM altogether.

4 Connect Webforms to Your CRM:

Why waste your time re-typing the info the customer has already provided? This saves time and eliminates errors. Most CRM's come with their own webforms. And most 3rd party webforms (**Jotform, Gravity Forms, Formstack,** etc.) can be connected natively or via Zapier to most CRM's.

5 Score Your Leads:

Not all leads were created equal. As a salesperson, you need to allocate more energy toward strong leads and less energy toward weak leads. Spend more time with leads who are more likely to reward you with a sale or a higher ticket sale. Automate follow up and spend less (or no) time with weak leads. For example: in B2B sales companies with more employees probably have a bigger budget for your services. Therefore you may want to score a company of 1,000 employees much more highly than a company with 15 employees.

6 Use Call Booking Software:

I can't stress this enough. It's so much more efficient than the old way of doing things. In inbound sales, asking for a client's phone number on a form so that they can wait on you to call them back is outdated and may cost you the lead. Lots of prospects no longer feel comfortable giving out a phone #. And even if they do, what if you call back and they don't pick up? You've likely lost the sale. Instead, allow them to book time with you through **Calendly, Acuity, Oncehub,** or other call scheduling software. It's not 1997 any more. Eliminate phone tag. Call booking software allows both prospects and salespeople to operate more efficiently.

7 Use Video Conferencing Software:

This directly relates to #6. This means prospects don't have to leave a phone #. And if you're a new-age salesperson, you can share your laptop screen to better present your product or service during the sales call. And instead of finding and dialing a phone number (10 or more digits), both parties only need to click once to join the meeting.

8. Use Calendar Software:

Google Calendar or **Outlook Calendar** will allow you to connect both the video conferencing and call booking software. Now your entire call booking process is completely streamlined. Just remember to set your availability on your calendar each week.

9. Link Software Systems to Your CRM:

Aside from those mentioned in #7 - #9 other software systems may be highly important to your sales process: **justcall.io** (call dialer), **Docusign** (contracts), or **Dropbox** (file storage). Most can be linked to CRM systems. The more you connect to your CRM, the more organized and efficient you'll be. And the more deals you'll close.

10 Automate Stages in Your Pipeline:

I don't recommend over-automating your sales process. Sales nurturing still needs to be personal. That said, you'll want to automate in small iterations. You may notice, for instance, that in the second stage of your pipeline you always send the same email to clients. Automate it. Automation is meant to save you time and remove monotonous tasks so you can devote your time to winning deals. Not copying and pasting emails.

11 Set Tasks and Reminders:

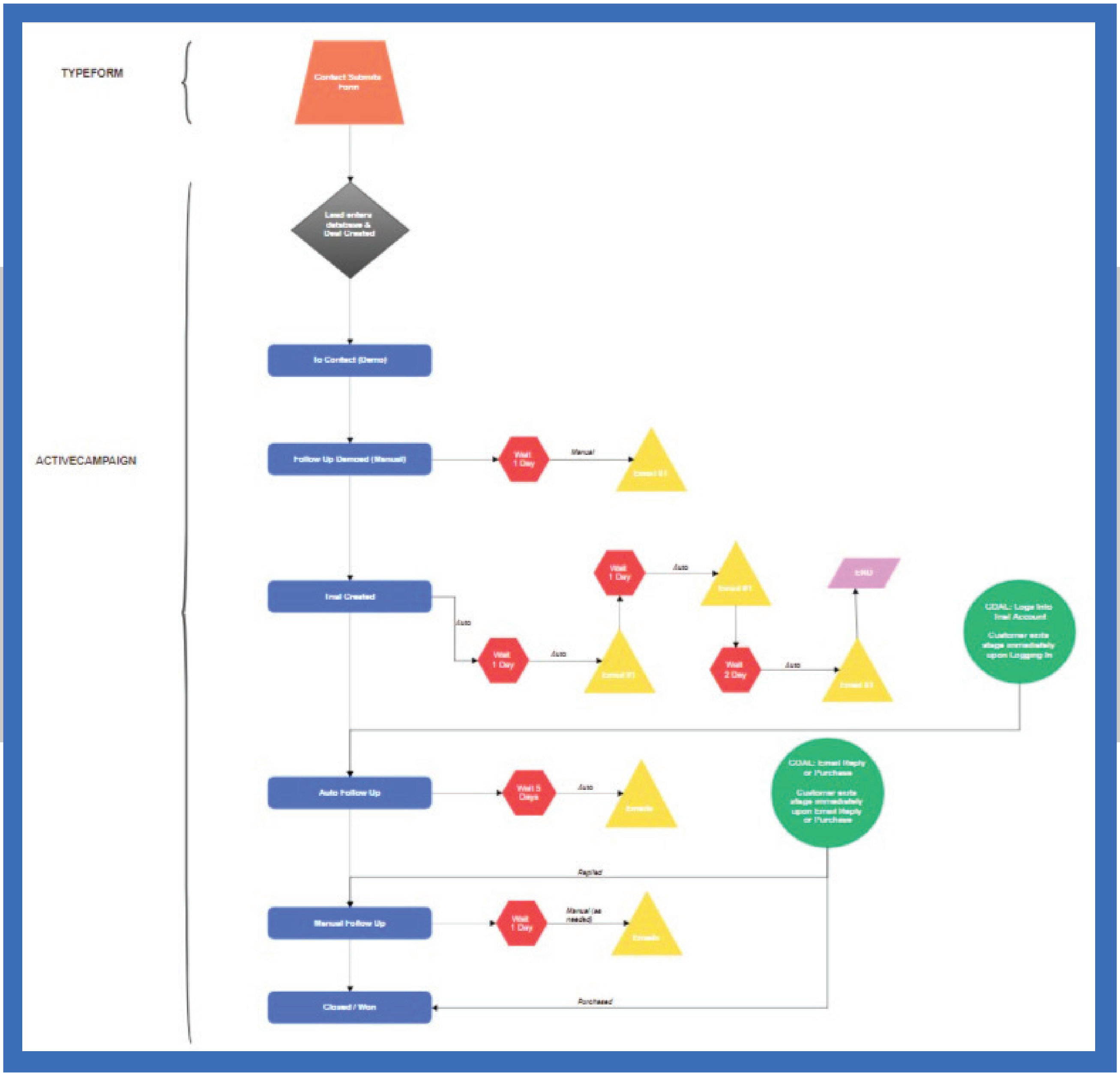
It shocks me how few people do this. All CRM's worth their salt have tasks and email reminder functionality. Utilize them and automate task assignment as much as possible.

12 Take Notes!:

Yes, this sounds obvious. But so many sales people neglect to do this. Nothing needs to be formal here. You can quickly type into your CRM the key points of your conversation and attach them to the deal. But if you don't do this, you could look bad on your next call if you've forgotten important details about the first call.

13 Map out Version 1 of Your Process:

This by no means needs to be the final version of your sales process, but rather the Minimal Viable Product (MVP). This will help you visualize the big picture before you build out anything. That initial mapping can look something like this:



(Do you want us to help you design a sales process? If so please [click here to learn more.](#))

14 Leverage Goals & Conversions:

Most CRM's allow you to set up goals & conversions. If you set these up properly, you can see activity that leads up to the completion of these goals. For instance, do certain emails lead to deals closing? Or to more calls being booked? Put some thought into setting these up and you'll gain more insight into what works and what doesn't.

15 Analyze the Data:

Now that you have a process, you can start collecting data. Within a few months you can start to analyze that data. Most CRM's have reporting features such as close ratio, deal forecasting, etc. Learn how to use the reporting systems and take stock in what's going on.

16 Fine-Tune the Process:

By analyzing the data, and simply getting your hands dirty with the CRM, you'll want to continue to optimize and improve your sales process. You can automate more, start to treat leads differently depending on lead score, and much more. No need to do this all overnight though. As you observe areas for improvement, chip away and alter your process.

17 Pick a Great CRM:

Stop using spreadsheets or managing your leads through memory. To establish an efficient sales process you need a CRM. There are many CRM's on the market, but here's our choice both in terms of value and in powerful features: ActiveCampaign.

If you'd like to learn more about how we can help you design a winning sales process,

Please click this link!