

New Customer Acquisition Lead Generation Check List

Generating the quantity and quality of new customer leads necessary to achieve your revenue goals is a great concern for most organizations. This check-list is designed to help you develop Lead Generation efforts that maximize your potential for greater success. Based on our 30+ years of experience working with for-profit and non-profit organizations, the information explains what best in class organization have in place, and offers examples of what that can look like – as well as what it doesn't look like. A brief explanation as to why this need is important is also included. If you have questions about what is presented here, feel free to contact us – we're happy to help!

CHECK	What you Need	What this means	What this doesn't mean	Why
	Clearly defined target audience for your offering.	For each program/service offered, you have a detailed description include demographics, psychographics, behavioral and geographic factors	Anyone who has money to spend or takes advantages of your promotional offers.	The more specific your target audience, the more likely you are at selecting the most appropriate media and putting forth the most effective messages and offers – which will generate higher response rates.

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	Dedicated budget	There are specific financial resources set aside for new customer acquisition, specifically lead generation.	There is one big bucket of budget dollars for "all marketing activities" that is somehow split between new customer acquisition, customer retention, customer reactivation, and general advertising, social and traditional media and other stuff.	The lack of a dedicated budget is a top indicator that you are unprepared and winging it. Know what your assets are so you can best leverage them.

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	Written plan	<p>You have laid out who does what, why, when, how so that everyone understands their role and performance standards – this leads to more efficient teamwork.</p> <p>This includes goals, objectives, budgets, strategies and tactics</p>	<p>Everyone assumes that what they are doing is the proper thing to do – and they have no idea how their work impacts others which leads to missed deadlines, gaps, and lost new customers.</p>	<p>The lack of a written plan is a top indicator that you are unprepared and winging it. Be prepared – or not. But know that preparation is key to success.</p>
	Measurable objectives	<p>You need to know what success is – measurable objectives are the best option.</p>	<p>We work hard, we know we did our best – and we'll see what happens.</p>	<p>You never know if you succeeded if you don't have a measurable objective.</p>

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	One person with the authority and responsibility for the successful achievement of new customer acquisition goals.	Accountability.	Absence of accountability.	The fastest path to failure is no owner, no one person responsible for success with the authority to make it happen.
	Efficient process for testing media, messages, offers,	You track each lead generation activity, so you can report on the number and quality of inquiries as well as the number of new customers generated by activity	You don't know what works so you don't manage your resources efficiently	When you know what is working – and what isn't – you can reallocate resources and maximize performance.
	Trained staff to respond to inquiries from potential new customers	Do they know what to ask, how to capture and store data etc.	You wing it.	A consistent, efficient process for capturing the right data and storing to properly so you can reference it easily in the future to drive decisions is key. You want to qualify and prioritize inquiries ASAP so you know if they want what you offer, whether they fit your customer profile and what lead generation campaign motivated them to contact you.

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	Standardized reporting that addresses each lead generation activity reporting on dollars spent, target audience, projected goals/objectives for campaign, actual results in terms of inquiries, qualified leads generated	You know what works – and what doesn't.	You have no idea what works.	You can modify activities, reallocate resources and improve as you progress

CHECK	What you Need	What this means	What this doesn't mean	Why
	You have a written plan that addresses partnerships with other corporations, government agencies and/or non-profits	You have laid out who does what, why, when, how so that everyone understands their role and performance standards – this leads to more efficient teamwork.	Everyone assumes that what they are doing is the proper thing to do – and they have no idea how their work impacts others which leads to missed deadlines, gaps, and lost new customers.	The lack of a written plan is a top indicator that you are unprepared and winging it. Be prepared – or not. But know that preparation is key to success.
	You have one person that is responsible for and authority over the partnership efforts.	Accountability	No accountability.	Accountability increases the potential for success
	Your partnership plans have a dedicated budget	Commitment	Lack of commitment	The lack of a dedicated budget is a top indicator that you are unprepared and winging it. Know what your assets are so you can best leverage them.

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	You have a written plan for referrals	You have laid out who does what, why, when, how so that everyone understands their role and performance standards – this leads to more efficient teamwork.	Everyone assumes that what they are doing is the proper thing to do – and they have no idea how their work impacts others which leads to missed deadlines, gaps, and lost new customers.	The lack of a written plan is a top indicator that you are unprepared and winging it. Be prepared – or not. But know that preparation is key to success.
	You have one person that is responsible for and authority over the referral program	Accountability	No accountability.	Accountability increases the potential for success
	Your referral program has a dedicated budget	Commitment	Lack of commitment	The lack of a dedicated budget is a top indicator that you are unprepared and winging it. Know what your assets are so you can best leverage them.