The purpose of this tool is to provide a comprehensive checklist that every sales leader should use to evaluate their alignment with Lead Generation efforts. Alignment as a term is specifically used to challenge the rules of engagement and configuration that exists between the sales force and the lead generation efforts.

These world class attributes of sales to lead generation alignment are universal regardless of whether the lead generation team is part of sales or marketing.

Instructions:

1. Read the description to gain full context into the World Class attribute.
2. Place an affirmative checkbox next to each attribute that your current approach satisfies. Leave it blank if you partially or do not fulfill.
3. Total the number of affirmative checklists and analyze the results.

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| **Checklist** | **World Class Attribute** | **Description** |
|  | **Due Diligence BEFORE contacting a prospective lead** | The Lead Generation team must be aligned with the sales field. Prior to contacting a prospect for the first time the lead generation teams MUST do research to understand the status of the Account. The CRM is searched to understand if there is an active Opportunity and/or Contact. The Lead Management process is documented with sales leadership to provide clear direction for prospective leads with active sales activity.  |
|  | **Openness of accounts to lead generation**  | Don’t Smother Lead Generation Efforts. Don’t be paranoid and close out your lead generation team from a large portion of accounts. With solid due diligence in place to identify active opportunities and contacts, remove the draconian level of protection of sales rep accounts. Limit the number of ‘protected’ accounts. Constrain the parameters that squelch lead generation efforts in existing accounts. Stop wasting time building protective walls. Spend more time focusing the activities you want. Let lead generation teams extend the capability of the sales field to nurture many contacts concurrently.  |
|  | **Comprehensive view of the Revenue Lifecycle**  | Transition from silo views of marketing and sales where the Revenue Lifecycle is fragmented. Instead operate with comprehensive view from prospect Inquiries that can be tracked all the way through to Leads, Opportunities, and Wins.  |
|  | **Clear areas of responsibility**  | A comprehensive Revenue Lifecycle cannot be complete with a neck to choke if results are there. Does the lead generation team have a person assigned to a single responsibility? Or do they have multiple people assigned to the same responsibility resulting in zero accountability? World class firms have clear responsibilities for the key roles of Lead Generation.  |
|  | **Formal definition of a Lead**  | The lead generation team and sales have worked in collaboration to develop this guiding definition. Leads are developed that meet the criteria and sales reps have expectations based on this definition.  |
|  | **Provide concise and specific Lead feedback on a per-lead basis** | Don’t let your reps throw mud by giving negative feedback without specific details. Be tough with feedback. Provide specific details on why leads were not good. Coach on what makes a great lead. Continuous feedback between the individual rep and the contact providing the leads is required for success. |
|  | **Nurturing in your Demand Generation** | Recognize that what makes a great sales rep is a hunter instinct to produce results. Demand Generation efforts will drive inquiries and prospects early in the buying process. In a complex b2b sale, pressure to qualify too early in the process can be detrimental. Companies with Lead Development Representatives and Marketing Automation have the capability to offer resources and build a rapport. This planned cadence speeds up the overall buying process to accelerate momentum to a formal sales lead.  |
|  | **Allow Leads to Develop (Don’t choke the Golden Goose)** | When challenged with a tight quota, don’t prematurely pull under-developed prospects that aren’t ready into the sales rep’s call plans. As lead generation efforts increase in success; resist the urge to increase the short-term quantity of leads to the sales force by lowering the criteria for when a lead passes off to the sales rep. Allow best practices in lead management to work for your sales force. |
|  | **Return to Nurture** | When your reps receive a Lead that's not ready or is non-responsive, simply return the lead to the lead generation team to continue nurturing. Let the nurturing resources of lead generation work on your behalf to cultivate awareness, onto interest, through consideration. The sales reps will get pulled back in at the right time.  |
|  | **Regular Cadence of Performance Review** | Lead Generation teams should have regularly scheduled meetings with sales leadership to report on results. This regular meeting forms the ongoing collaboration necessary to provide timely insights and drive corrective action. Monthly or Quarterly reviews are too infrequent to get to root cause problems that are holding lead generation results back from peak performance. Regular weekly or bi-weekly meetings enable the platform for world class lead generation. |
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| **Total QTY**  | **Affirmative Checks** | Qty Action Step10 Congratulations! You have world-class alignment8-9 Fine-tuning efforts should be opportunistically pursued4-7 Significant efforts are required, you are missing opportunities0-3 Immediate attention is required, you are off course  |

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