LEAD MANAGEMENT AUDIT

There are five major stages to audit in your lead management process: Lead generation, Lead qualification and segmentation, Lead nurturing, Lead scoring and routing, and Measurement of success. In order to identify and prioritize which stage to tackle first, audit the stages in the following order:

1. Lead generation
2. Lead qualification and segmentation
3. Lead nurturing
4. Lead scoring and routing
5. Measurement of success

Answer the questions below to evaluate which elements of your lead management process may need improvement and which stages should be prioritized.

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1. Lead generation

Do you have a way of generating leads through your website?

☐ YES   ☐ NO

*If you answered **Yes**, answer the following questions:*

What is your average view-to-contact conversion rate on your website?
How does it compare to benchmarks?

How are you generating the most leads? From what sources? From what campaigns?
From what content?

Where should you be generating more leads? From what sources?
From what campaigns? From what content?

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2. Lead qualification and segmentation

Do you have a way to qualify sales-ready leads or segment new contacts that enter your database?

☐ YES   ☐ NO

*If you answered **Yes**, answer the following questions:*

Is your sales team spending too much time talking to unqualified leads? What type of leads should not be passed to your sales team?

Is your marketing team sending blast emails and receiving low engagement or high unsubscribes? Which emails are garnering these results?

Are you able to identify which contacts are ready to enter your sales process? Which contacts need more email nurturing?

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2. Lead qualification and segmentation continued

What's the difference between a marketing qualified lead vs. a sales qualified lead?

What are your segments? Why do you segment those contacts?

3. Lead nurturing

Do you have a way to engage and nurture your non-sales qualified leads?

☐ YES   ☐ NO

*If you answered **Yes**, answer the following questions:*

What is your average email open rate and click-through rate? Are these meeting **industry benchmarks**?

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3. Lead nurturing continued

Do you have a high unsubscribe rate? Which emails have the highest unsubscribe rates?

Do you have automated emails set up based on a contact's activity or information? Which emails can you automate to save your marketing team more time?

Are your lead nurturing efforts helping turn contacts into sales qualified leads? Which emails or content are doing this the best?

Are your lead nurturing efforts influencing purchases? Which emails or content are influencing the most purchases?

4. Lead scoring and lead routing

Is your sales team struggling to prioritize which leads to speak to?

☐ YES   ☐ NO

Are leads often being missed or not getting passed to the right salesperson?

☐ YES   ☐ NO

*If you answered **No** for either question, answer the following questions:*

Have there been any sales-ready leads that haven't been taken care of recently?
Why is that and how can you close that gap?

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How is your sales team notified of a sales-ready lead? Can that process be automated?

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Do each of your salespeople manage certain leads based on industry or product
interest? If so, which sales member should handle those leads?

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4. Lead scoring and lead routing continued

What qualities or activities do your sales teams consider when prioritizing which leads to speak to?

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5. Measurement of success

For your activities that help manage leads, are you able to measure the ROI?

☐ YES ☐

Can you attribute which activities helped turn leads to customers?

☐ YES ☐

*If you answered **Yes** for either question, answer the following questions:*

What are your KPIs for lead management? How do you track and measure those? Are you meeting those KPIs?

5. Measurement of success continued

Is your lead management process helping move leads through their buyer's journey?
If so, how do you prove that?

Is your lead management process influencing more customers and purchases?
If so, how are you measuring that?

Are your lead management activities making it easier for your marketing team to
manage leads? Are they making it easier for your sales team to manage leads?

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Lead management priorities

List the stages you need to improve in order from 1 to 5, and add what you would like to improve about that stage.

Priority	Lead management stage	What to improve
1		
2		
3		
4		
5		

Need additional help?
Watch the HubSpot Academy video [Auditing Your Lead Management Process](.).

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