

LEAD GENERATION CHECKLIST



1. INTRODUCTION

Welcome to our B2B Marketing & Sales Checklist! Like many business owners, I've navigated the confusing world of digital marketing and know how daunting it can be. This checklist is your straightforward guide to simplifying and mastering these crucial skills. Together, we'll uncover practical steps to enhance your marketing and sales efforts, tailored for your business's success.

2. SELF-ASSESSMENT

It's time to start working with the checklist. Do a self-assessment!

HOW?

Answer questions below. This will serve as a foundation to make changes in your current situation:

A) WEBSITE EVALUATION



1. Is your website easy to navigate?
 - Think about whether visitors can find what they're looking for quickly.
2. Does your website clearly state what your business offers?
 - Assess if your products or services are described clearly and concisely.
3. Is your contact information easy to find?
 - Consider if customers can easily reach out to you.
4. Is your website mobile-friendly?
 - Check how your site looks and functions on mobile devices.

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B) EMAIL MARKETING READINESS



1. Do you use email to communicate with your clients or leads?
• Reflect on how often and effectively you use email as a communication tool.
2. Do you have a system for collecting email addresses?
• Think about whether you have a method to grow your email list.
3. Are your emails personalized and targeted?
• Consider if your emails speak directly to the needs of your recipients.

C) OUTBOUND SALES APPROACH



1. Do you have a defined process for outbound sales?
• Evaluate if you have a structured approach for reaching out to potential clients.
2. How do you follow up with leads?
• Assess your method for staying in touch with potential customers after the initial contact.

D) SOCIAL MEDIA PRESENCE



1. Are you active on social media platforms relevant to your industry?
• Consider if you're engaging with your audience on platforms where they are most active.
2. Do you regularly post content that is relevant to your business and audience?
• Reflect on the consistency and relevance of your social media content.

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3. ACTION PLAN DEVELOPMENT - TIPS

After completing the self-assessment, use your insights to create a personalized action plan. Here are some general steps to guide you:

A) WEBSITE IMPROVEMENT ACTIONS:



1. Simplify Navigation: Ensure that your menu is straightforward and your most important pages are easily accessible.
2. Clarify Your Offering: Revise your homepage to concisely explain what your business does and why it matters to your clients.
3. Enhance Contact Visibility: Add your contact information in a prominent location, such as the header or footer.
4. Mobile Optimization: Test your website on various mobile devices and make necessary adjustments for better usability.

B) EMAIL MARKETING STRATEGY



1. Start a Newsletter: Begin sending regular newsletters to keep your clients informed and engaged.
2. Create an Email List: Add a sign-up form on your website to collect email addresses, offering value in return (e.g., a free guide).
3. Personalize Your Emails: Use your clients' names and tailor content based on their interests or past interactions.

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C) OUTBOUND SALES APPROACH

1. Define Your Sales Process: Outline clear steps for your sales outreach, from initial contact to follow-up.
2. Create a Follow-Up Schedule: Develop a consistent plan for following up with leads, such as an email or call schedule.

D) SOCIAL MEDIA ENHANCEMENT

1. Choose the Right Platforms: Focus on social media platforms where your target audience is most active.
2. Content Calendar: Plan and schedule regular posts that are relevant and interesting to your audience.
3. Engage with Your Audience: Regularly interact with comments and messages to build a community around your brand.

4. ACTION PLAN DEVELOPMENT - TOOLS

These tools can help you on your journey. I'm using many of them on daily basis and they helped me A LOT!

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A) WEBSITE IMPROVEMENT ACTIONS:



HOTJAR

[HTTPS://INVITE.HOTJAR.COM/FTTQTA0B6X9P](https://invite.hotjar.com/FTTQTA0B6X9P)

HotJar is a user behavior analysis tool that helps you understand how visitors interact with your website. It offers features like heatmaps and user recordings, which can be used to identify areas for improvement and enhance user experience.

CRAZYEgg

[HTTPS://WWW.CRAZYEgg.COM/](https://www.crazyegg.com/)

Similar to HotJar it can generate heat maps and provide you with information about behaviour or users on your website. Also it includes A GREAT feature of conducting surveys on your website.

SEMRUSH

[HTTPS://SEMRUSH.SJV.IO/EKGN2D](https://semrush.sjv.io/EKGN2D)

SEMrush is a comprehensive digital marketing toolkit that offers solutions for SEO, competitor analysis, and online visibility. It helps in optimizing your website for search engines and understanding your market position.

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B) EMAIL MARKETING STRATEGY



CONVERTKIT

[HTTPS://CONVERTKIT.COM?LMREF=HGP3QA](https://convertkit.com?lmref=hgp3qa)

ConvertKit is an email marketing platform designed for creators, offering tools to build and manage email lists, create personalized emails, and automate campaigns. It's particularly useful for engaging with your audience and growing your online presence.

BOUNCER

[HTTPS://BIT.LY/BOUNCERLINK](https://bit.ly/bouncerlink)

If you plan cold mailing campaigns then Bouncer is a great solution to verify email before you will actually start messaging people.

C) OUTBOUND SALES APPROACH

APOLLO.IO

[HTTPS://BIT.LY/APOLLOSALESINTELLIGENCE](https://bit.ly/apollosalesintelligence)

Apollo.io is a sales intelligence and engagement platform, offering tools for finding and connecting with potential clients. It helps in building targeted lead lists and automating outreach efforts.

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LINKEDIN SALES NAVIGATOR

[HTTP://BIT.LY/3RQEYNN](http://bit.ly/3RQEYNN)

LinkedIn Sales Navigator is a specialized platform within LinkedIn, tailored for sales professionals. It helps in finding and connecting with potential B2B clients through advanced search and personalized algorithm recommendations.

D) SOCIAL MEDIA ENHANCEMENT

MIRO

[HTTP://BIT.LY/3RQEYNN](http://bit.ly/3RQEYNN)

Miro is an online collaborative whiteboard platform, ideal for media planning and brainstorming content ideas. It enables teams to visually organize, develop, and share social media strategies and topics in a flexible and interactive environment.

HOOTSUITE

[HTTPS://WWW.HOOTSUITE.COM/](https://www.hootsuite.com/)

Hootsuite is a widely-used social media management tool that allows you to schedule and post content across multiple platforms. It also offers features for monitoring social media activity and engaging with your audience.

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CONTACT US

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