

LEAD SCORING WORKFLOW TEMPLATE

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PROJECT MANAGER

CATEGORY AND ACTIVITIES	PERSON RESPONSIBLE	DEADLINE	APPROVAL
COLLECT YOUR MARKETING QUALIFIED LEADS (MQL)			
Buyers or current customers			
Potential buyers			
Reports from sales teams			
Other tasks			
UNDERSTAND YOUR LEAD BEHAVIOR AND ASSIGN SCORES			
Attendance at conference or event			
Form submissions			
Time on website and pages viewed			
Content downloads			
Email clicks and opens			
Webinar registrations			
Newsletter subscriptions			
List memberships			
Other tasks			
DETERMINE TRIGGERS TO CREATE AND LAUNCH YOUR PROGRAM			
New contact			
Email opens			
Content downloads			
Purchase			
Abandoned cart			
Service, sales request			
Milestones such as anniversaries or birthdays			
MEASURE PERFORMANCE			
Email open and click-through rates			
Unsubscribe rates			
Average order value			
Sales conversions			

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