

The Ultimate Lead Conversion Checklist

Goal: Turn more traffic into paying customers by auditing your sales funnel.

Campaign Name: _____ | **Date:** _____

Phase 1: Foundation & Qualification

Before you try to sell, ensure you are targeting the right people.

- [] **Ideal Customer Profile (ICP) Defined:** We have clearly identified the industry, job title, and budget of our target lead.
- [] **Lead Scoring Model Active:** We have assigned point values to actions (e.g., Pricing Page Visit = +10, Email Open = +2).
- [] **"Junk" Filter Installed:** We use a framework (like BANT) to quickly disqualify leads that have no budget or intent, saving sales time.
- [] **Forms Optimized:** Our sign-up forms ask for the minimum necessary info (Name + Email + 1 Qualifying Question) to reduce friction.

Phase 2: Speed & Nurturing

The money is in the follow-up. Are you staying top-of-mind?

- [] **The "5-Minute Rule":** New leads receive an automated welcome email or SMS within 5 minutes of signing up.
- [] **Segmentation Check:** We have separated leads into lists based on their interests or industry (no generic "blast" emails).
- [] **Value-First Content:** Our email sequence provides 3 pieces of value (tips, guides, videos) for every 1 sales pitch.
- [] **Multi-Channel Approach:** We are not relying solely on email; we also use LinkedIn, phone, or SMS for high-value prospects.

Phase 3: Closing & Optimization

Remove friction and build trust to get the final "Yes."

- [] **Social Proof Visible:** Testimonials, case studies, or trust badges are clearly visible on our landing pages and in our emails.
- [] **Clear Call-to-Action (CTA):** Our buttons are benefit-oriented (e.g., "Get My Free Plan" vs. "Submit") and placed above the fold.
- [] **Frictionless Booking:** We use a scheduling tool (like Calendly) to let leads book demos instantly without email back-and-forth.
- [] **Retargeting Ads Set Up:** We have pixels installed to show ads to users who visited but didn't convert (to bring them back).

Audit Scorecard

0 - 4 Checks: Leaking Revenue. Your funnel has major holes. Focus on fixing Phase 1 immediately. **5 - 8 Checks: Solid Foundation.** You are converting well, but losing opportunities on speed or nurturing. **9 - 12 Checks: Conversion Machine.** Your system is optimized for high growth. Focus on scaling traffic.