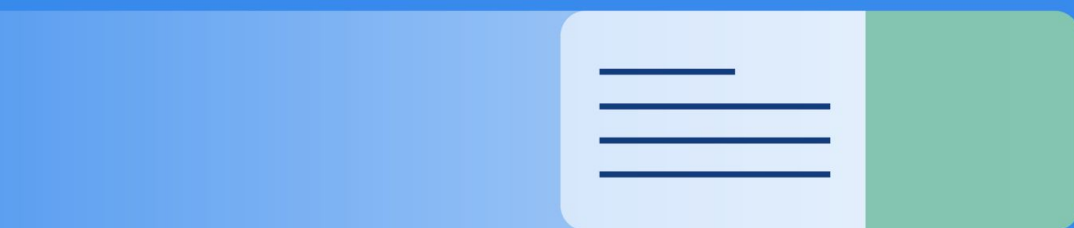
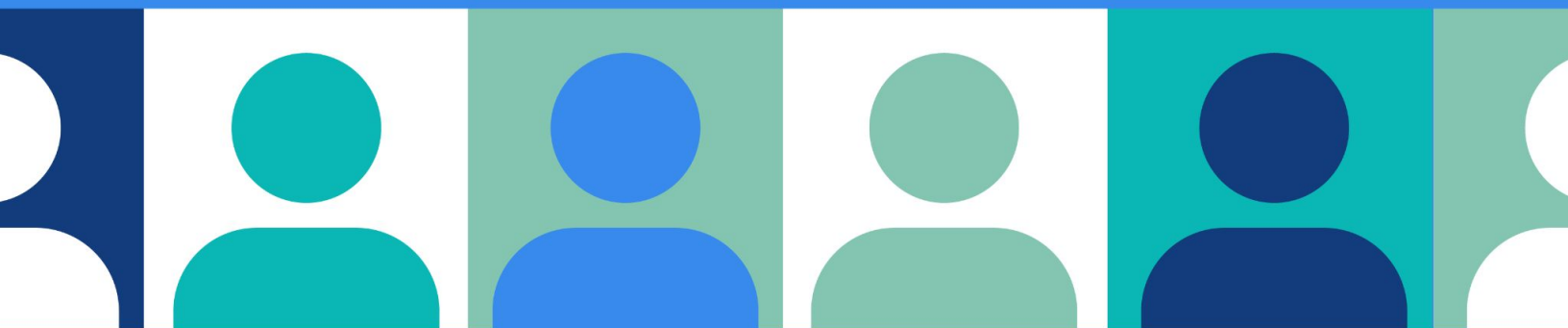
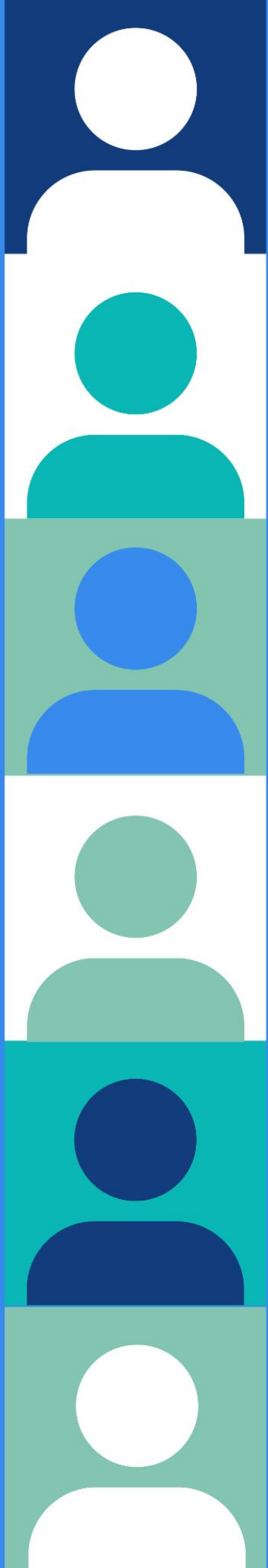


CallRail

Tip Sheet

7 ways to build a lead management strategy



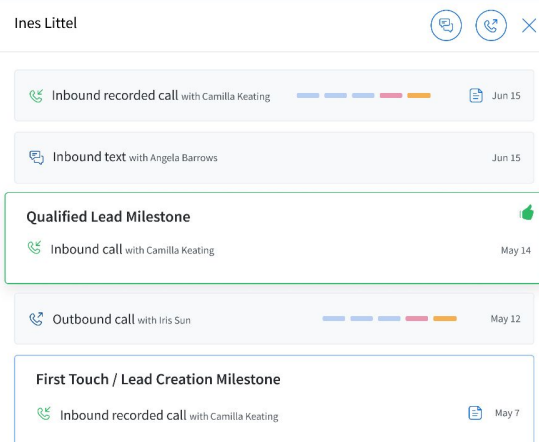


There's a lot of focus on generating leads for your business. But without a streamlined process to move those leads from interested prospects to paying customers, you're missing huge opportunities.

Enter your lead management strategy. It's the refined system that your businesses will use to attract, monitor, and engage leads — from their first contact with your business all the way to when they make a purchase.

Wondering how to build a lead management strategy that guides prospects in a strategic and thoughtful way? Here are seven tips to make sure you aren't letting leads slip through the cracks.

1 Identify the phases of your lead's journey



Website visitors don't go from searching for a service online to becoming your prospective customer in a single step (or in marketing speak, move from a [marketing qualified lead \(MQL\)](#) to a sales qualified lead (SQL) in a single step). To effectively manage leads, you need to understand the typical phases they move through. What happens after you capture a lead? How do you continue to nurture and engage them? When and how are you communicating?

2 Understand your ideal customer(s)

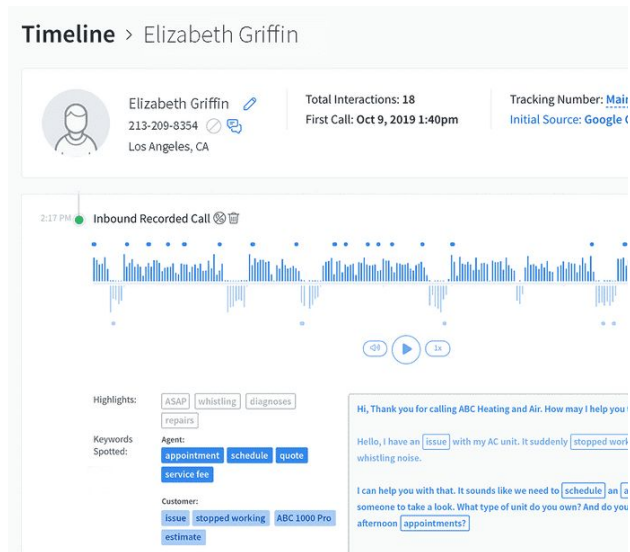
You don't just need to know what you're doing — you need to know who you're doing it for. Your lead management strategy should be crafted with your target customers in mind. Ask questions to better understand your customer: what are their days like? What challenges do they face? How do they make decisions? This information can be used to create buyer personas, which combines market research and existing customer data to form representations of your ideal customer. If you don't already have [buyer personas](#), create some so that you can think through how customers will respond to the various techniques you'll use.

3 Make information readily accessible

Clear communication before, during, and after a sale is crucial. Your first outreach to leads should include basic information about what you offer. Don't get caught up in jargon and sales gimmicks — people become frustrated if they can't find easy answers. Make your contact information unmissable and consider creating digital self-service features like a knowledge center or a chatbot to handle simple questions.

4

Offer value



While the ultimate goal of lead management is to secure a paying customer, your strategy can't be all sales messages all of the time. In addition to highlighting how your product solves a problem, provide other resources — blog content, webinars, worksheets, tips, templates, and more — that help people succeed, even without making a purchase.

5

Personalize your messages

Today's customers have come to expect a certain level of personalization. In fact, 72% of customers say they will only engage with personalized marketing. This goes beyond including their first name in an email. Your lead management strategy should target customers effectively both in terms of messaging (e.g. what you say to someone making a first purchase will differ from a second purchase) and in the communication channels you use (e.g. social media or email marketing).

6

Mix inbound and outbound strategies

Both inbound and outbound marketing play a role in lead generation, nurturing, and conversion. Creating helpful and valuable content will be the bulk of your inbound marketing, but balance that with outbound tactics like attending trade shows or industry-relevant events.

7 Create a single source of truth

The keyword in lead management isn't "lead" — it's management. To ensure you're making the most of every opportunity and relationship, you and your team need a centralized place to oversee and engage with all of your leads. Look for a [communications hub](#) that allows you and your team to easily see a history of all of your interactions and communicate with your customers from the same system so that you can more effectively manage those relationships at every stage of the journey.

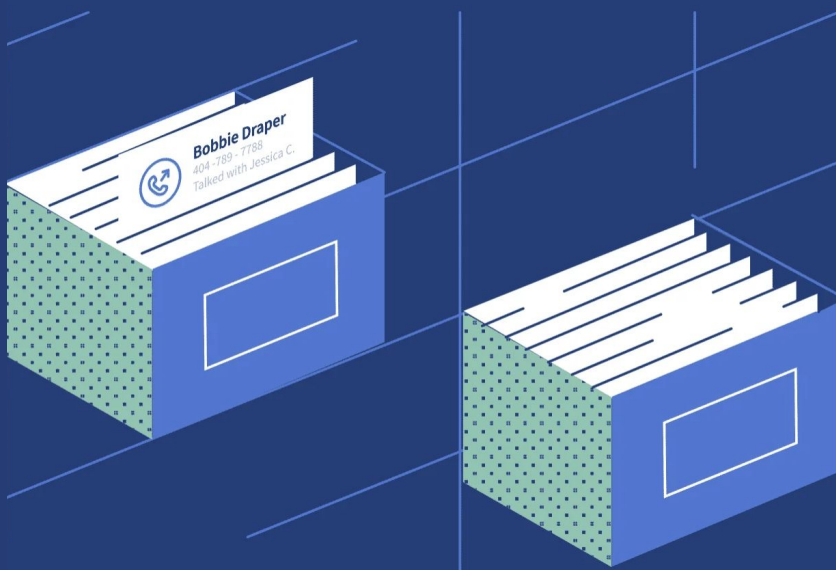
The screenshot displays a CRM interface. On the left, a list of incoming calls is shown under the heading 'INCOMING'. The first call is from Iris Sun, Anne McFadden (616-328-7016), with a 'Respond' button. Below this are 'ACTIVE' calls, including voicemail for Iris Sun from Ivah Osinski (616-328-7016), Edison Labadie from Maggie Walsh (423-756-0649), and another voicemail for Iris Sun from Ivah Osinski (616-328-7016). At the bottom, another Edison Labadie call from Little Rock, Arkansas (501-348-5866) is listed. On the right, a detailed view of an 'Inbound recorded call' is shown for Anne McFadden. It includes the date (Jan 15 7:12am), tracking number (Booking Main Lin), duration (2m 38s), agent (Johnny Cline), and source (Booking Main Lin). A waveform visualization and a legend show 86% agent and 14% customer activity. A 'Thank you for call southern sun vacator' message is visible at the bottom.

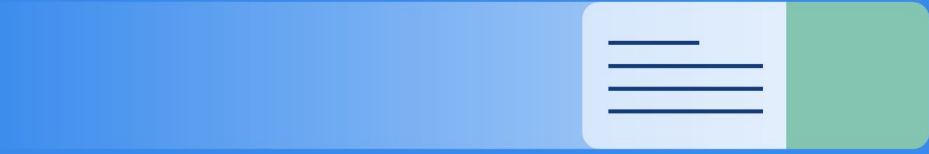
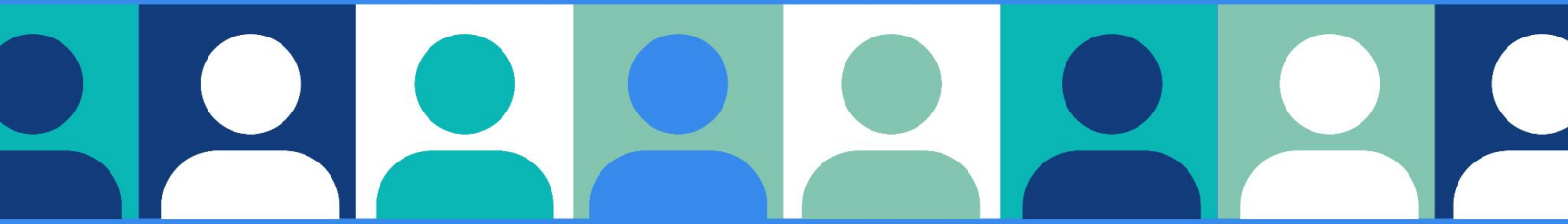
More lead management resources

Looking for more information to help you iron out a fool-proof lead management strategy?

Make sure to check out:

- [What is lead generation?](#)
- [What is lead management?](#)
- [How to improve lead management](#)





Take control of your leads.

Lead Center centralizes your incoming, active, and recent calls, texts, and chats in one place. Combined with Call Tracking, Form Tracking, and Conversation Intelligence, a comprehensive timeline of prospect and customers interactions provides all of the context you need — from their first call to their most recent text — so you'll never lose another lead.

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