

# Lead Generation Planner

How to Attract, Convert, Nurture, and Close Leads

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# Phase 1: Attract (Strangers → Visitors)

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## My Campaign

Name of Campaign:

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Campaign Landing Page URL:

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## Goals

Primary (i.e. Increase leads from social media by 25% over the next 6 months.)

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Secondary (i.e. Decrease bounce rate on the campaign landing page by 10%.)

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## Leads are coming to my landing page through:

Check the following opportunities that apply.

- Search engine marketing
- Social media
- Content (Website, blog, press release, news articles, etc.)
- Out of home
- Television
- Radio
- Print
- Email
- Other: \_\_\_\_\_

## Phase 2: Convert (Visitors → Leads)

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### Landing Page Checklist

Check the following elements you plan to include.

- Attention-grabbing headline
- Informative sub-headline
- Engaging imagery
- Consistent design with the organization or campaign brand
- Clear, incentivizing call-to-action
- Form that meets user and business needs
- A form button that reinforces the value the user is receiving
- No navigation or external links
- Copy that explains the offer and is concise
- Thank you landing page that explains the user's next steps
- Other: \_\_\_\_\_

# Phase 3: Close (Leads → Customers)

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## Lead Nurture

Goal (i.e. Earn the business of 10% of leads within one year.)

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Strategy (i.e. Follow-up email marketing communications.)

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Tactics (i.e. Marketing automation tools, content marketing promotion, schedule a meeting.)

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Lead lifecycle stages (i.e. Cold, Cool, Mild, Medium, Hot.)

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Timespan and workflow (i.e. Email, call, email, call, email, call.)

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Call-to-action (i.e. Apply Now.)

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# Phase 4: Delight (Customers → Promoters)

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## Advocates

List your top three customers (financially, strategically, or socially).

1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_

## I can leverage and engage my current customers through:

Check the following opportunities that apply.

- Customer reviews
- Testimonials
- Case studies
- Social media
- Email, newsletters
- Events

**Need any help generating leads?  
Feel free to email us at  
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