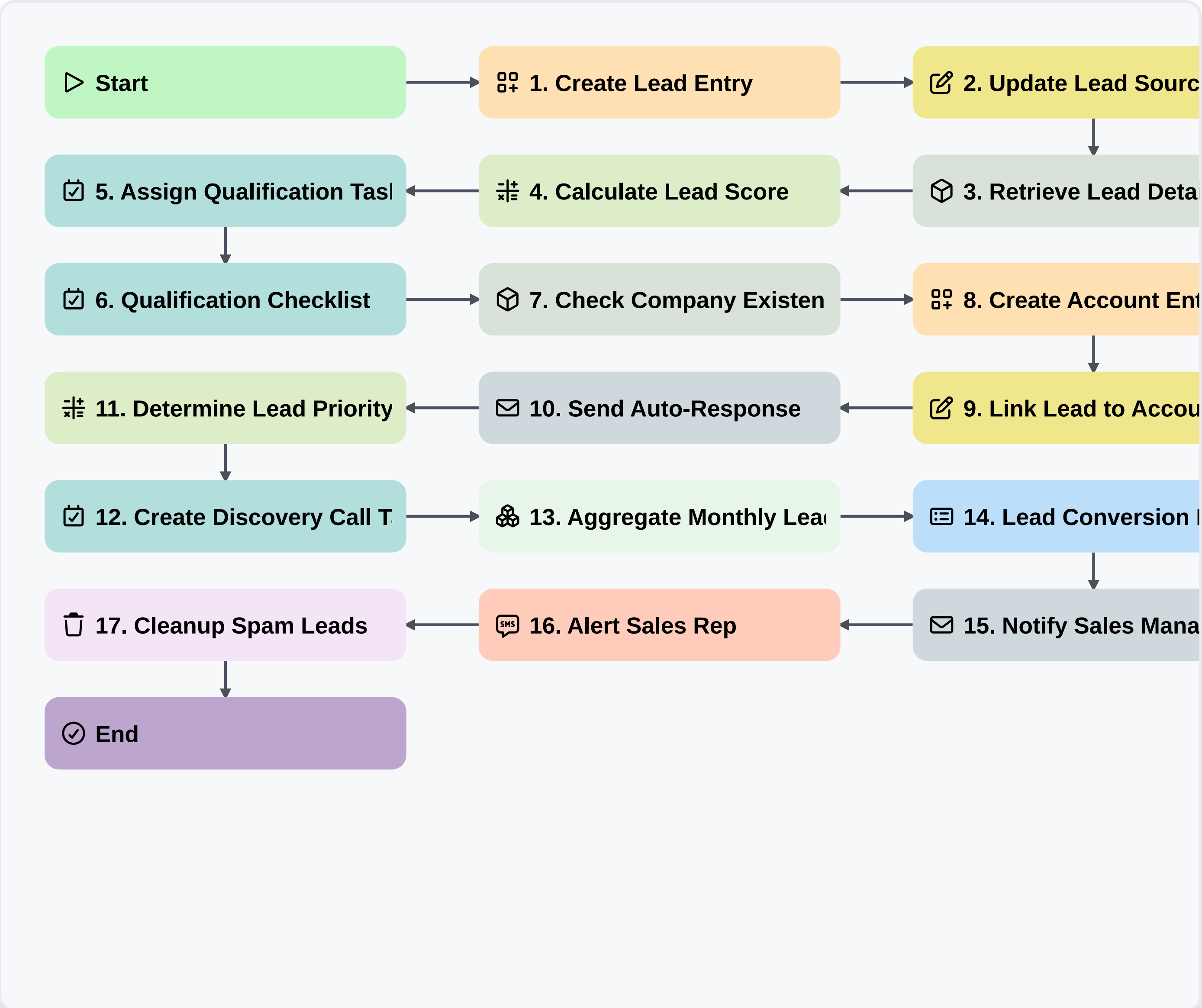
ChecklistGuro

Buyer Inquiry And Lead Qualification Process



Start
Start of the Workflow/Process.

1. Create Lead Entry
Create a new entry in the 'Leads' data model when a new inquiry is received via webform.

2. Update Lead Source
Update the existing Lead entry with specific channel information (e.g., Website, LinkedIn, Referral).

3. Retrieve Lead Details
Fetch contact information and inquiry details from the Lead data model for qualification.

4. Calculate Lead Score
Execute a formula based on firmographics and budget to determine the Lead Score (e.g., Budget * Urgency).

5. Assign Qualification Task
Create a task for the Sales Development Representative (SDR) to review the new inquiry.

6. Qualification Checklist
A list of steps for the SDR: Verify email, check company size, confirm budget range, and check decision-maker role.

7. Check Company Existence
Search the 'Accounts' data model to see if the inquiring company already exists in our database.

8. Create Account Entry
If the company is new, create a new entry in the 'Accounts' data model.

9. Link Lead to Account
Update the Lead entry to associate it with the identified Account entry.

10. Send Auto-Response
Send an automated 'Thank You' email to the prospect confirming receipt of their inquiry.

11. Determine Lead Priority
Use the Lead Score to assign a priority level (High, Medium, Low) to the task.

12. Create Discovery Call Task
If Lead Score is 'High', create a task for the Account Executive to schedule a discovery call.

13. Aggregate Monthly Lead Volume
Sum the number of new Lead entries created this month to track marketing performance.

14. Lead Conversion Report
Create a report showing the ratio of qualified leads to total inquiries for the current period.

15. Notify Sales Manager
Send an email notification to the Sales Manager when a 'High' priority lead is identified.

16. Alert Sales Rep
Send an SMS alert to the assigned SDR when a new high-intent lead is assigned to them.

17. Cleanup Spam Leads
Delete entries from the Lead data model that are identified as junk or spam during qualification.

End
End of the Workflow/Process.