

BEST PRACTICE GUIDE



CPB UK

LEAD FOLLOW UP & MANAGEMENT

LEAD GENERATION | MARKETING SOLUTIONS | IT DATA



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Lead
Types

A photograph showing a business meeting. Two people are visible from the chest down, standing at a wooden table. One person is holding a black pen, and the other is holding a white pen. They are looking at several sheets of paper on the table that contain charts and graphs. A smartphone is also visible on the table.

1. BEST PRACTICE INTRO

Effective lead follow up is a key component to maximising the success of any outsourced telemarketing campaign.

With persistent and dedicated follow up, you're opening the door to building a connection with your new prospect, ensuring that your prospect does not forget the initial qualification call that took place with CPB UK's representative and creating rapport to help you move the opportunity forwards.

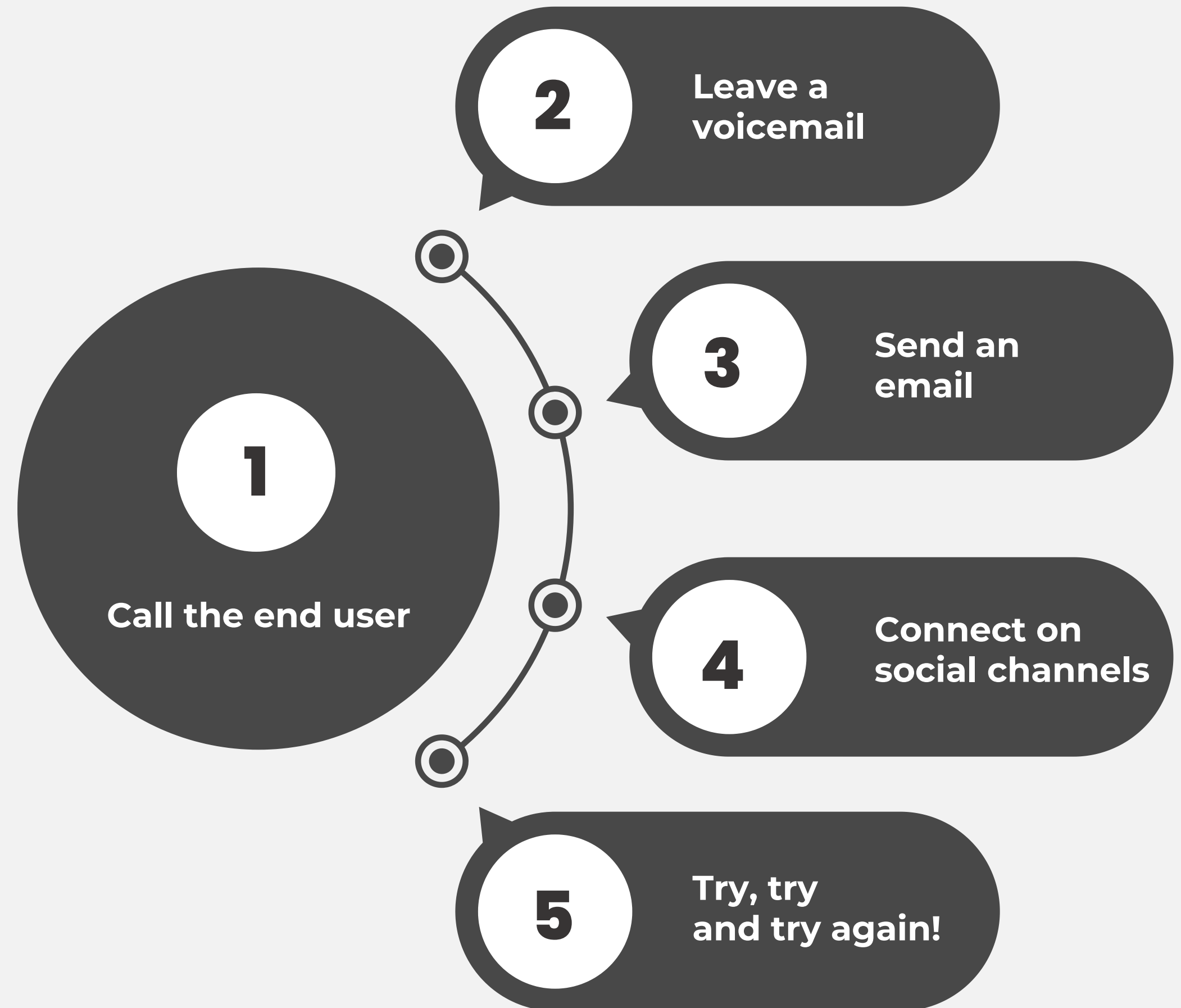
When you are allocated a sales opportunity:

- Ensure that the lead is reviewed within 24 hours
- Follow up the lead within 24-48 hours with an initial telephone and email introduction, to pre-qualify the lead notes
- Flag the opportunity within your internal CRM platform
- If there are any potential issues, please flag to CPB within 1 week max. – feedback is key!
- Make sure that the opportunity is deal registered

2. BEST PRACTICE STEPS

Do not lose hope if the contact does not stick to the agreed call to action. Be proactive with getting through to the end user, persevere with your follow up steps.

? *Did you know... it takes an avg. 18 dial attempts to reach an IT decision maker or influencer?*





3. TOP TIPS

- Follow up each lead within 24 hours to maximise your chances of success
- Make a personalised introduction
- Use your email or automated CRM tools to send an immediate acknowledgment or thank you message
- Send relevant articles, case studies, or whitepapers that address their specific needs or interests
- Don't rely solely on one method. Use a mix of emails, phone calls, and social media messages to reach out
- Reference specifics from the initial qualification call / opportunity notes, such as the prospect's needs or challenges to aid in a response and engagement
- Focus on how your product or service solves a problem for the prospect, rather than just going for the 'hard sell'
- Be persistent
- Each follow-up should include a clear next step, whether it's scheduling a call, arranging a demo or pre-setting the agenda for an upcoming meeting
- Feed back to the agency of any challenges within 5 working days of lead receipt



Did you know... the initial 24hrs after qualifying a lead are the most crucial for further engaging your prospect?

A prospect's interest is at its peak and research shows that those followed up within 24 hours are 60% more likely to convert to meeting stage than those contacted later.



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