Clear | RESOURCE MARKETING

7 DAYS TO BETTER SYSTEMS | Day 4

LEAD MANAGEMENT

Tracking and managing prospective clients and their information. Build your database.

BEST PRACTICES and steps to take:

- ☐ Create a Lead Capture Form
    - ☐ Keep it basic: Name, Email, and Phone Number. Feel free to add 1-2 more questions so you can identify what they need from you.
    - ☐ NOTE: This form is to just get the prospective client through the door. You are going to send a more detailed questionnaire next. But, to start, keep this initial form short and simple.

☐ Create a Questionnaire

- ☐ Automate this form to send as soon as your system receives the Lead Capture Form
- ☐ Ask questions that will help you vet and qualify the prospective client.
- ☐ NOTE: This is where you start to determine if you are the best company for their needs and if they are the best client for you.
- ☐ Set a due date for the questionnaire (this due date should be visible on questionnaire and/or clearly stated in the email)
- ☐ Schedule a reminder
    - ☐ NOTE: These tasks can be automated so that you do not have to do them. This is done with the use of a CRM system. Our CRM of choice is 17Hats. Click here to get it for yourself at a significantly low rate.*

--- SEE A LEAD FORM EXAMPLE ON THE NEXT PAGE ---

*Affiliate Link

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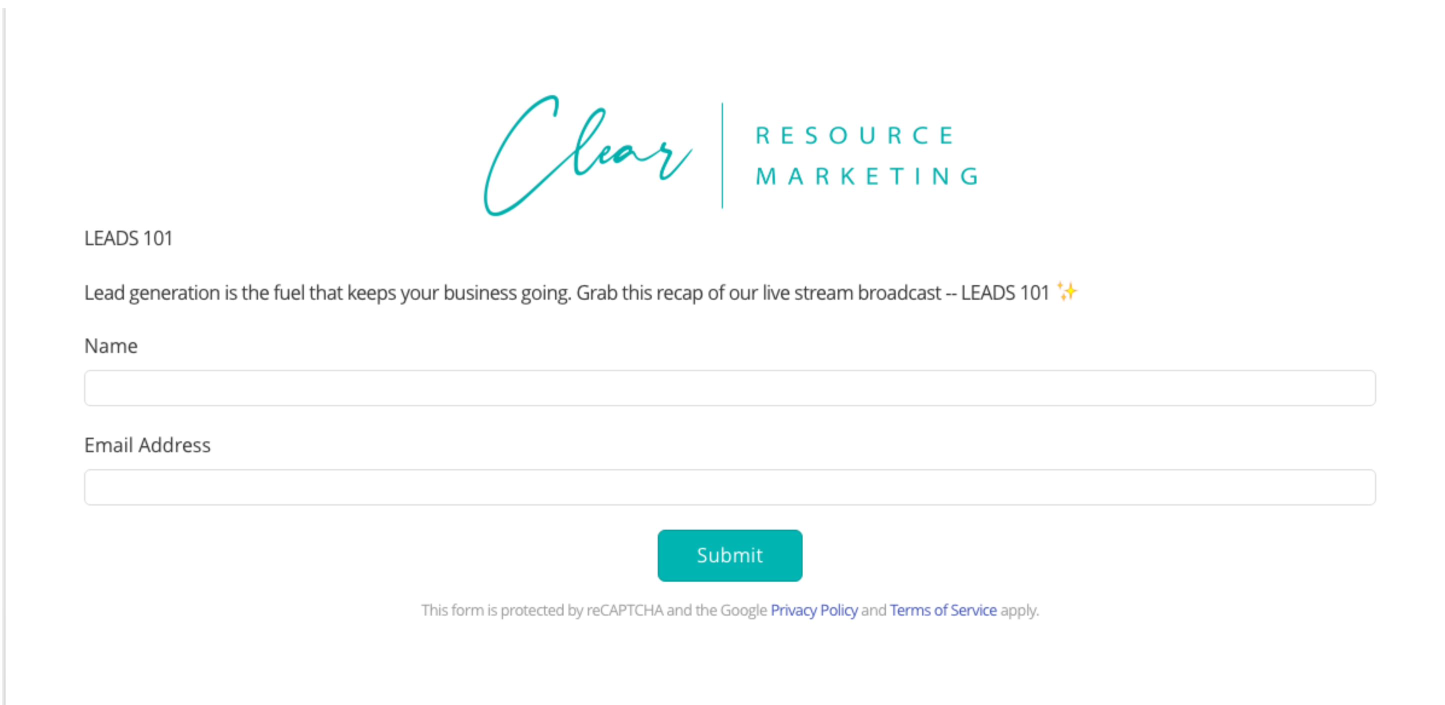
Here's an actual Lead Form used by Clear Resource Marketing. This form accompanies a [video about how to capture Leads](). If viewers desire a recap of the video, they exchange their information with us via this form. On the back end, the recap is automatically emailed and their information is stored into our database.

NOTE: This form is simple, well branded, and easy to complete. Do not impose a lot of work on the initial contact.



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LEADS 101

Lead generation is the fuel that keeps your business going. Grab this recap of our live stream broadcast -- LEADS 101 ✨

Name

Email Address

Submit

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