# EOS Core Process: Lead Generation and Nurturing

Process Owner: [Person from EOS Accountability Chart]
Last Updated: [Date]
Review Date: [Next quarterly review date]

## EOS Integration

Connected EOS Tools:
Related EOS Rocks: [Current quarter Rocks that improve this process]
EOS Scorecard Metrics: [Weekly numbers tracked for this process]
Accountability Chart Connection: [Which seat owns this process]

## Process Overview

Purpose: Convert prospects into qualified leads and nurture them through the sales funnel

## High-Level Steps

1. Identify target audience and channels
2. Create lead magnets and capture mechanisms
3. Execute lead generation activities
4. Score and qualify leads
5. Nurture leads through automated sequences
6. Hand off qualified leads to sales
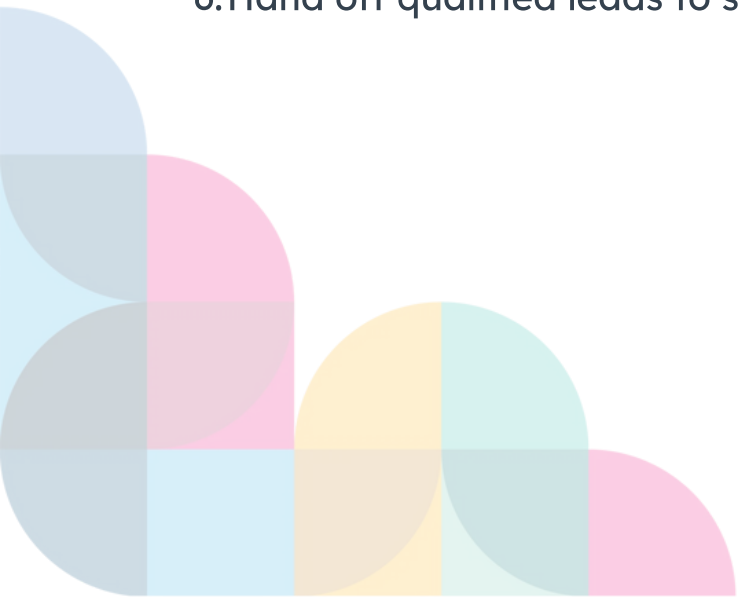
# Core Process Detailed Steps

### Step 1: Identify Target Audience and Channels
- Review ideal customer profile (ICP) and buyer personas
- Identify where target audience spends time online
- Select 2-3 primary lead generation channels
- Set monthly lead generation targets by channel

### Step 2: Create Lead Magnets and Capture Mechanisms
- Develop valuable content offers (ebooks, webinars, templates)
- Create landing pages for each lead magnet
- Set up lead capture forms with progressive profiling
- Configure thank you pages and confirmation emails

### Step 3: Execute Lead Generation Activities
- Publish content offers across selected channels
- Run paid advertising campaigns to drive traffic
- Optimize organic content for lead capture
- Monitor and adjust campaigns based on performance

### Step 4: Score and Qualify Leads
- Assign point values to lead actions and characteristics
- Set up automated lead scoring in CRM/marketing automation
- Define MQL (Marketing Qualified Lead) criteria
- Create alerts for high-scoring leads

### Step 5: Nurture Leads Through Automated Sequences
- Develop email nurture sequences by buyer persona
- Create educational content for each funnel stage
- Set up behavioral triggers for sequence enrollment
- Include clear CTAs for next steps in customer journey

### Step 6: Hand Off Qualified Leads to Sales
- Create lead handoff criteria and process
- Set up automated notifications to sales team
- Provide lead context and scoring information
- Track conversion rates from MQL to opportunity

# Quality Standards & Success Metrics

Must-Have Standards:
[ ] Standard 1 (measurable)
[ ] Standard 2 (measurable)
[ ] Standard 3 (measurable)

EOS Scorecard Metrics:
Weekly Metric 1: [Target number]
Weekly Metric 2: [Target number]
Monthly Metric: [Target number]

**Accountability:** Marketing team owns steps 1-5, Sales team owns step 6
**Frequency:** Ongoing with weekly performance reviews
**Success Metrics:** Lead volume, cost per lead, MQL conversion rate, lead-to-opportunity rate

# Process Connections

**Receives From:** [Which EOS core process feeds into this one]
**Hands Off To:** [Which EOS core process this feeds into]
**Dependencies:** [Other processes or resources needed]

# Tools & Resources

## Required Systems/Tools:

Tool 1
Tool 2

## Template/Document links

Training Materials:
Link to training video
Link to detailed SOPs (if needed)
Onboarding checklist

## Troubleshooting & Common Issues

If [Problem], Then [Solution]:
Problem 1 → Solution 1
Problem 2 → Solution 2
Problem 3 → Solution 3
Escalation: [When to involve process owner or leadership team]

# Process Improvement

Last Quarter's Improvements: [What was changed and why]
Current Issues to Address: [Items for next EOS Rock or Level 10 discussion]
Issue 1
Issue 2

Ideas for Next Quarter: [Potential improvements to consider]

Approval & Sign-Off

Process Owner Approval: [Name + Date]
Leadership Team Review: [Date reviewed in Level 10 or quarterly]
Next Review Date: [Align with EOS quarterly cycle]

# Quick Reference Card

[One-page summary of key steps for daily use]

## The 5 Key Steps:

[Step 1 summary]
[Step 2 summary]
[Step 3 summary]
[Step 4 summary]
[Step 5 summary]

Key Metrics: [2-3 most important numbers to track]

Emergency Contacts: [Who to call if process breaks down]