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# **Identify and Find Qualified Leads**

## **Learning Segment #7**

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## Self Analytical Instrument – Identify and Find Qualified Leads

Directions: Read the questions below and respond appropriately.

I sometimes do a lot of casework and then find out prospects cannot afford my suggestions.	Yes	No
I discard prospects if they do not buy.	Yes	No
I have a criteria by which I qualify prospects and I never deviate.	Yes	No
I have a constant flow of qualified leads in my own niche.	Yes	No
I generally get my leads from lists.	Yes	No
I am clear where my next lead is coming from.	Yes	No
I know that referrals and warm introductions are just one source of leads.	Yes	No

*“68% of people we call on are not decision makers.”*

Sales Management Magazine

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In this Learning Segment you will learn:

Six guidelines to ensure a lead is qualified.

What are the best leads.

Where to acquire the best leads.

When to discard leads.

## Identifying Qualified Leads & Lead Sources

Why should you get qualified leads?

- You get discouraged because you often work hard with no real results.
- Because no road chosen, any road will do.

So you must set \_\_\_\_\_ and stick to them.

**Six guidelines you should use for qualifying leads are:**

1. Have the \_\_\_\_\_ to make the buying decisions.
2. Have the \_\_\_\_\_ to influence the committee decision.
3. Identify a legitimate \_\_\_\_\_ for your product or services.
4. Derive a \_\_\_\_\_ from doing business with you.
5. Have the \_\_\_\_\_ power to acquire your product or services, or do business with you.
6. Network and \_\_\_\_\_ with others of similar enterprise or lifestyle interest so you can leverage your efforts.

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## How can you find qualified lead sources for your targeted Vertical Markets?

Now that you have researched and identified, in the last Learning Segment, local organizations that support your market, to find qualified leads for the vertical markets you are targeting, clear focus is essential. Whether it is an Enterprise Market such as plumbing supply owners, or a Lifestyle Market such as the local Cancer Society, use these sources.

1. Contact your vertical market association membership chairperson and ask how you can \_\_\_\_\_ the organization as a supplier member. Join and this will give you the local list of members. The most effective way to generate leads is to become a \_\_\_\_\_ of the Lifestyle or Enterprise organizations you want to target, and build relationships with the members.
2. Ask the centers of influence you met with for \_\_\_\_\_ with the membership list.
3. If you can't join, ask a current client for their \_\_\_\_\_ of the organizational membership list.
4. \_\_\_\_\_ to present a webinar, seminar or service in exchange for their membership list, if you can't join.
5. For Lifestyle Markets, contact \_\_\_\_\_ - \_\_\_\_\_ organizations and political organizations to join. The list will be provided to members. The most effective way to generate leads is to become a \_\_\_\_\_ of the Lifestyle or Enterprise organizations you want to target, and build relationships with the members.

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6. For groups who live or recreate close to one another, target leads by \_\_\_\_\_, i.e., elementary schools, country clubs, little leagues.
  7. Call the \_\_\_\_\_ director of each trade and professional magazine in your targeted industry and have them identify the number of subscribers in zip codes you selected and purchase their subscriber list.  
**Tips:**
    - Give them your selected zip codes.
    - Find out the cost to purchase this list of targeted subscribers.
    - Make sure these are current subscribers, not expired subscribers.
  8. Use the online \_\_\_\_\_ Pages for cultural, charitable, religious, ethnic, as well as professional and small business listings.
  9. To discover individuals in your market who do not belong to an organization, use the \_\_\_\_\_ sites listed in the back of this section of the workbook to capture names of other individuals in your specific vertical markets.

### **Critical Point:**

**The most effective way to generate leads is to become a member of the Lifestyle or Enterprise organizations you want to target, and build relationships with the members.**

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## How do you maximize leads?

1. It is critical that you become a \_\_\_\_\_ of the same Enterprise and Lifestyle associations & affiliations where the people you are targeting belong. \_\_\_\_\_ - \_\_\_\_\_ precedes fund-raising.
2. Before you contact any prospect, search \_\_\_\_\_ on the Internet.

Look for their interests and backgrounds to discover bridges to people you know or organizations in which you have clients or friends. This could lead to a warm introduction.

3. Discover this about each and every prospect before you reach out to them:

- where do they work and for how long?
- where did they go to school?
- what is their education level?
- scan their title on [www.salary.com](http://www.salary.com) to get a sense of their income
- how they are involved in their clubs or organizations:

Do they serve on a board or committee?

Have they written an article?

- what civic or industry awards or recognition have they received?
- what is their family status, including children?

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4. Maximize your leads by \_\_\_\_\_ them until they are ready to buy.
  5. Know when you should start throwing names away.
    - A. When they no longer qualify based on the \_\_\_\_\_.
    - B. Only after you can \_\_\_\_\_ they have...
      - no authority,
      - no ability,
      - no need,
      - cannot derive a benefit, or
      - have had a drastic financial change in circumstances,...should you discard.

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## Tips to brilliantly execute lead sources:

1. \_\_\_\_\_ . Think beyond the normal sources of leads. Use the Internet sources listed in the back of this section of the workbook to work your markets deep. Also use any Market Briefs for your market in the Research Lab on the Weylman Center.
2. Small is \_\_\_\_\_ than large. Quality is much better than quantity.
3. Be sure the leads \_\_\_\_\_ and \_\_\_\_\_ with one another.
4. Search \_\_\_\_\_ name on the Internet before you call, write or meet with them. Find connection points.
5. Avoid asking for \_\_\_\_\_ lists, attain membership or subscriber lists.
6. \_\_\_\_\_ to the qualifying guidelines.
7. In larger metro areas, work \_\_\_\_\_.
8. Be \_\_\_\_\_ for leads at all times.
9. If acquiring leads to reach beyond membership lists, be sure that they are the \_\_\_\_\_ possible.
10. Take \_\_\_\_\_ – turn to your Marketing Action Plan in the back of this Learning Segment and list several lead sources you will pursue in your chosen vertical market.

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# **ACTION PLAN TO IDENTIFY LEAD SOURCES IN MY ENTERPRISE AND LIFESTYLE VERTICAL MARKETS**

Page 1 of 2

THE LEAD SOURCES I AM GOING TO PURSUE IN MY CHOSEN VERTICAL MARKETS ARE:

(Check those you are going to use.)

- Contact current clients in the vertical market and acquire lists of others in that market. \_\_\_\_\_
- Join the organization I am targeting and get the membership list. \_\_\_\_\_
- Contact Circulation Directors of my vertical market magazines and newsletters and buy targeted zip code lists. \_\_\_\_\_
- Review my LinkedIn connections and spreadsheet all local, first connections in my vertical market. \_\_\_\_\_
- Conduct a seminar in exchange for a membership list. \_\_\_\_\_
- Contact the company Personnel Officer and present an in person or virtual program to a group of employees and collect names of attendees. \_\_\_\_\_
- Use the Internet sources listed in this section of the workbook. \_\_\_\_\_
- Use the criss-cross or city directory and market to homes by zip code, i.e., elementary schools, country clubs, little leagues... \_\_\_\_\_
- Ask centers of influence for assistance with their membership list. \_\_\_\_\_
- Contact fund raising and political organizations and purchase their lists. \_\_\_\_\_

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- Other lead sources for me will be:

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**Review this information again when you design your Master Marketing Plan during the final segment of this educational curriculum.**

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## **SOURCES TO IDENTIFY TRADE, RECREATIONAL, AND SPECIAL INTEREST ASSOCIATIONS AND GROUPS FOR LEADS**

- Internet Sources:
  - [www.forbes.com](http://www.forbes.com)
  - [www.infousa.com](http://www.infousa.com)
  - [www.prnewswire.com](http://www.prnewswire.com)
  - D&B Hoovers app
  - Local Association and Organization websites
  
- Douglas Publications, Inc.
  - 2807 N. Parham Rd., Suite 200
  - Richmond, VA 23294
  - 800-223-1797
  - [www.douglaspublications.com](http://www.douglaspublications.com)

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- National Trade & Professional Associations of the United States  
Columbia Books, Inc.  
P.O. Box 251  
Annapolis Junction, MD 20701  
888-265-0600  
[www.columbiabooks.com](http://www.columbiabooks.com)
  - Associations Yellow Book  
104 5<sup>th</sup> Avenue, 3<sup>rd</sup> Floor  
New York, NY 10001  
212-627-4140  
[www.leadershipconnect.io](http://www.leadershipconnect.io)
  - LinkedIn and Facebook specific groups that support your vertical market