

Build a Process for Seamless Lead Handoffs

Salesloft.

Do you feel like sales leads are disappearing at almost every lead handoff? You're not alone. It's happening even in the best companies. (Technically, the leads are still sitting in your CRM, lost in the never-ending sea of contacts and leads and accounts).

By improving your handoffs throughout the sales cycle you can increase your lead volume, and ultimately your revenue. Here's a checklist to get you started.

Plan

- ✓ Bring everyone who interacts with a buyer together and map out your buyer's journey from prospecting to customer expansion. [Here are templates you can use.](#)
- ✓ Identify all potential handoff points and prioritize changes based on the number of leads that get lost in each handoff.
- ✓ Determine success criteria. Ideas include: higher conversion rates from one stage to another, increase in number of opportunities per stage, number of accounts receiving/completing handoff communication.

Take Action

- ✓ Review and align your lead scoring model to eliminate sales/marketing friction.
- ✓ Set up your marketing automation system and qualification rules to get leads to sales as quickly as possible.
- ✓ Automate the sales-to-marketing handoff to ensure the transfer of information such as call recordings and transcripts, tech stack data, organizational charts, notes, and more.
- ✓ Add prospects to an [automated series](#) of emails, phone calls, and social media steps whenever a lead changes stage. This continues communication during the transition.
- ✓ Keep tabs on the handoff process for all contacts within the buyer's organization. Small details land big deals!
- ✓ Automate the sales-to-delivery handoff to ensure the transfer of information such as conversation recordings, deal details, customer goals, pain points, and communication style.

Assess

- ✓ Set up a process for consistently measuring and analyzing your success criteria.
- ✓ Pre-schedule quarterly meetings with key team members to ensure optimizations happen and documentation stays up-to-date.

Find out how Salesloft helps improve lead handoffs. [Start here.](#)

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