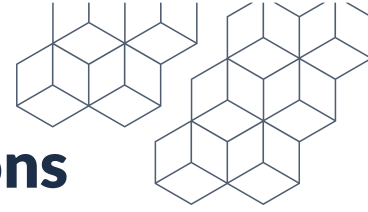




Workbook #1: Understanding Your Leads



Determining lead & conversion definitions

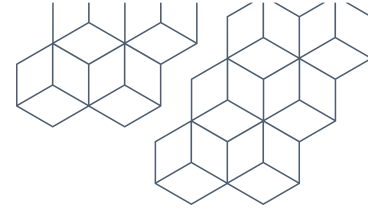
📦 How are you currently capturing leads on your website?

📦 Based on your revenue goal, where are you looking to draw your revenue from?

📦 When it comes to drawing revenue, what problems are you trying to solve?

📦 Do you have any forms on your website currently? If so, what type of information are you collecting?

📦 Are you currently running Facebook, Google, or LinkedIn Ads? If so, what is your Ads strategy?



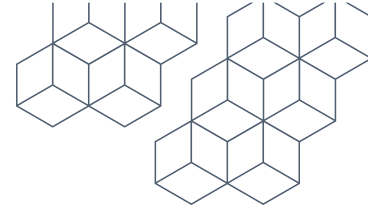
📦 What factors are important when qualifying your leads?

📦 What qualifies a contact as a Marketing Qualified Lead? An opportunity?

📦 Who are your current customers?

📦 What are your personas? Do you have them documented?

📦 Do you have any upcoming initiatives that we will be promoting through HubSpot?
(I.e. new product release, webinar, or event?)



Understanding your leads

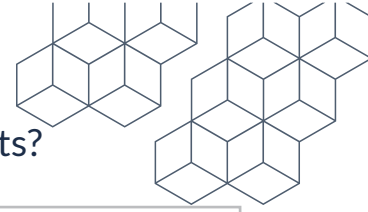
📦 Are you currently segmenting your contacts? If so, how?

📦 What are some characteristics/ engagements that we would use to deem a lead as qualified?

📦 What are some characteristics/ engagements that we would use to deem a lead as disqualified?

📦 What lead capture mechanisms do you currently have on your website?

📦 What types of questions are you asking on forms?



What types of email communications are you sending to your contacts?

How do you determine which contacts receive your different forms of communication?

What content are you currently using to support these audience(s)?

Next steps:

Go back to [HubSpot Onboarding](#) page.
We'll begin the Strategic Training next
starting with Personas.