1. Introduction

The Lead Generation Plan & Budget Template allows the user to quickly generate a Lead Generation Plan and Budget. Up to 10 Lead Generation Categories, typically email, telemarketing, advertising, tradeshows, etc. can be defined. Within each category the user can have up to 10 individual campaigns.

The user can specify the total number of leads required by month and as the budget and plan is created for each category, a graphic shows if there is a deficit or surplus for each individual month and on a year-to-date basis against the total number of leads required. Note: The Sales Pipeline Planner (see http://www.business-tools-templates.com/sales_pipeline_1.htm) can be used to calculate how many leads will be required to achieve sales revenue goals.

The user enters the budgeted expenditure for each month for each campaign and the number of leads planned from that campaign for that month. The average cost per lead for each campaign and by category is calculated and displayed graphically.

Budgets can be printed for each category detailing each of the campaigns and a summary by category can also be printed. Numerous charts are also produced.

2. User Instructions

The EXCEL model has a simple Push Button Menu system at the top of the Workbook in cell A2. (see page 4) The following general guidelines should be followed. Cells in Blue are intended for User Input. Cells in Black are calculated and should not be altered by the user. On first use it is recommended that the Menu Options be used in the sequence in which they are numbered, 1, 2, 3, etc. On subsequent use the options can be selected as required to make amendments to the data originally entered.

Prior to entering data the user should select which currency s/he wishes to use in formatting reports. This can be done by clicking on the chosen currency symbol in the dialog box to the immediate right of the Title Graphic (cell D1). Note this refers only to the currency symbol used and is NOT a currency conversion routine. You may need to install and enable the Excel Euro Currency Tools Add-in to display the € symbol properly.

2.1 Set-up

Choose Menu Option 1 from the menu to enter Company Name (e.g. My Company Ltd.) and Start Year and Month (e.g. 2006 and 1). These are used to display the Title and Month Headings on the various reports.

Select Menu Option 2 to enter the Number of Leads Required. This is the total number of leads the overall plan needs to generate each month. If you are using Sales Pipeline Calculator to calculate the number of leads you can use the “Paste a

Link" facility in MS-Excel. Alternatively you can enter the figures directly into the cells for the relevant months.

Menu Option 3 is used to enter the Lead Generation Categories (Direct Mail, email, Advertising, Trade Show, etc.) and Campaign Titles. Up to 10 different Categories can be used. Within each Category up to 10 Campaigns can be specified. The table below provides an example of a typical Campaign set-up.

LEAD GENERATION CATEGORIES

Direct Mail

New Year Renewal Campaign
Small Business Competitive Upgrade Campaign
Financial Services Target List
Trade Show Visitors
Summer Madness Special Offer
Lapsed Customer List
Service Contracts Upgrade Campaign
Financial Services Target List Follow-up
Distributor Recruitment Campaign
End of Year Close the Business Campaign

CATEGORY MONTHLY TOTAL

YEAR-TO-DATE CATEGORY TOTAL

Telemarketing

Campaign 1
Campaign 2
Campaign 3
Campaign 4
Campaign 5
Campaign 6
Campaign 7
Campaign 8
Campaign 9
Campaign 10

CATEGORY MONTHLY TOTAL

YEAR-TO-DATE CATEGORY TOTAL

2.2 Enter Leads Plan and Expenditure Budget

Menu Option 4 is used to enter the number of leads planned for each campaign. For each campaign, the number of leads to be generated in each month should be entered directly into the relevant cell.

Menu Option 5 is used to enter the Budgeted Expenditure for each campaign. For each campaign, the Budgeted Expenditure in each month should be entered directly into the relevant cell.

2.3 Calculation

Once the relevant data is entered a range of variables are automatically calculated. These are:

- The cost per lead for each campaign. The cost can be calculated on a monthly or year-to-date basis. For regular ongoing campaigns the monthly cost may be most appropriate. Some campaigns, such as exhibiting at a major tradeshow may involve significant upfront expenditure with the leads being generated over a number of subsequent months. In such cases, the cost per lead on a year-to-date basis may be more appropriate. A dropdown list in cell B13 allows the choice to be made between cost per month and year-to-date cost per lead.
- The average cost per lead for each category (direct mail, advertising, etc.) is calculated on a monthly and year-to-date basis.
- Total number of leads planned per month and on a year-to-date basis. The monthly and year-to-date deficit or excess compared to the number of leads required is also calculated.

2.4 Reports and Charts

Menu Option 6 is used to print the total plan and budget.

Menu Option 7 is used to print the individual plans for the different categories. A dropdown list in cell A13 is used to select the category plan to be printed. Menu Option 7 is then used to initiate the printing. (See example page 5)

A summary plan by category can also be printed by selecting Grand Total from the dropdown list and then using Menu Option 7 to initiate the printing.

A number of graphs and charts are automatically produced. These are:

- A bar chart that shows the number of leads per month by category (see page 6 below)
- A bar chart that depicts the number of leads per month required and planned and highlights the monthly deficit or excess planned against that required (see page 7 below).
- A bar chart that provides a summary of the number of leads per month required and planned on a year –to-date basis and highlights the cumulative deficit or excess planned against that required (see page 8 below).
- A graph that shows the average cost per lead on a monthly basis for each category and an overall average cost per lead (see page 9 below).

Lead Generation Plan & Budget Template

1. Enter Co. Name & Start Date
2. Enter No of Leads Required
3. Enter Categories & Campaigns
4. Enter Leads Schedule/Plan
5. Enter Campaign Budgets
6. Print Total Plan
7. Print Individual Category Plan

- $ Symbol
- Euro Symbol
- £ Symbol
- No Symbol

My Big Company Ltd
2006
1

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My Big Company Ltd
Lead Generation Schedule by Category for Year Starting 1st Jan 2006

Direct Mail	**Jan**	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**
New Year Renewal Campaign	50	30	20	10	0	0	0	0	0	0	0
Small Business Competitive Upgrade Cam	0	0	25	25	10	10	10	0	0	0	0
Financial Services Target List	0	0	100	100	50	0	0	0	0	0	0
Trade Show Visitors	0	0	0	0	100	50	25	0	0	0	0
Summer Madness Special Offer	0	0	0	0	0	100	50	20	0	0	0
Lapsed Customer List	50	50	20	0	0	0	0	0	40	40	20
Service Contracts Upgrade Campaign	0	0	20	10	0	0	0	0	20	10	0
Financial Services Target List Follow-up	0	0	0	0	0	0	0	0	50	50	40
Distributor Recruitment Campaign	20	10	10	10	0	0	0	0	10	10	10
End of Year Close the Business Campaign	0	0	0	0	0	0	0	0	0	50	50
Monthly Leads from Direct Mail	**120**	**90**	**195**	**155**	**160**	**160**	**85**	**20**	**120**	**160**	**120**
Y-To-D Leads from Direct Mail	**120**	**210**	**405**	**560**	**720**	**880**	**965**	**985**	**1105**	**1265**	**1385**

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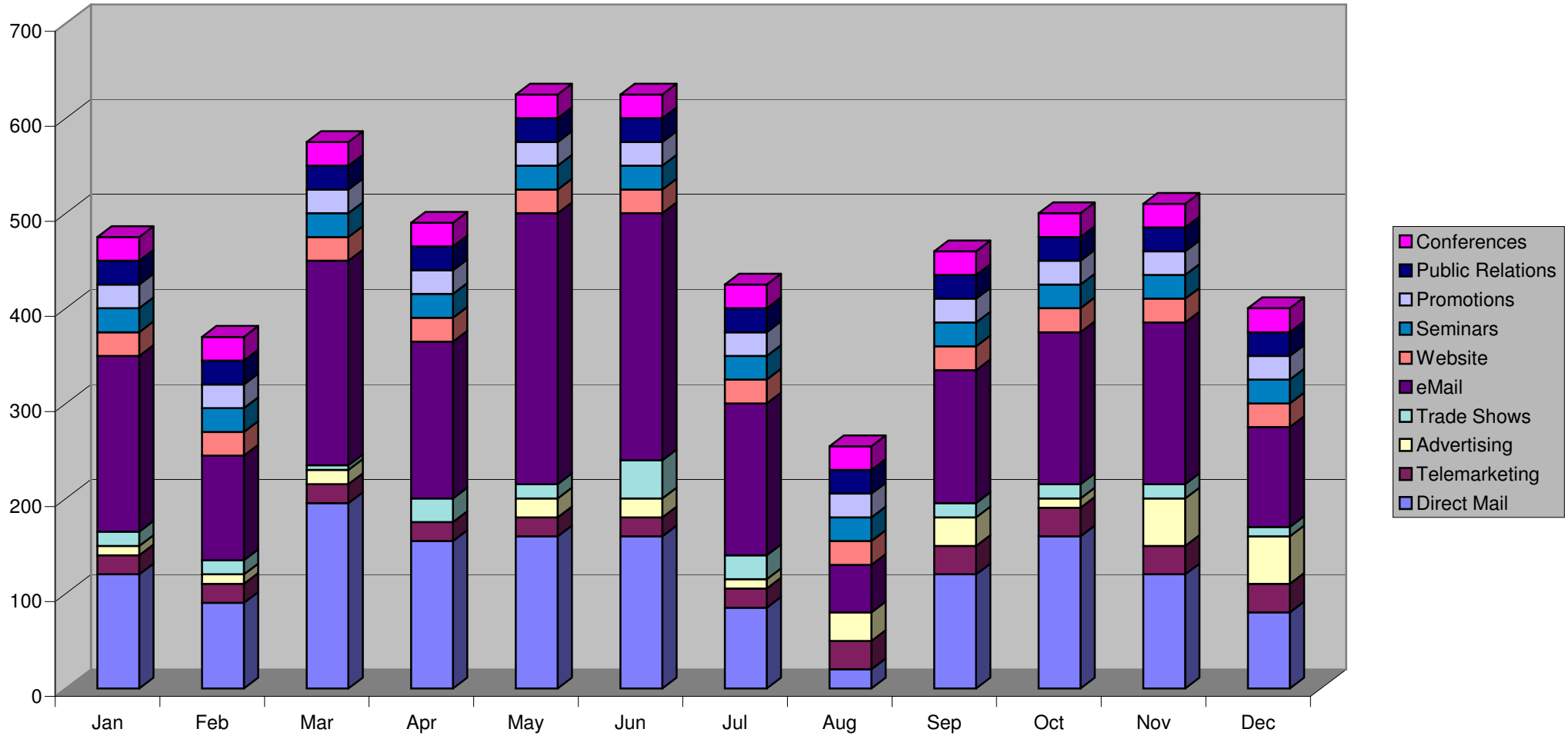
Monthly Leads by Category



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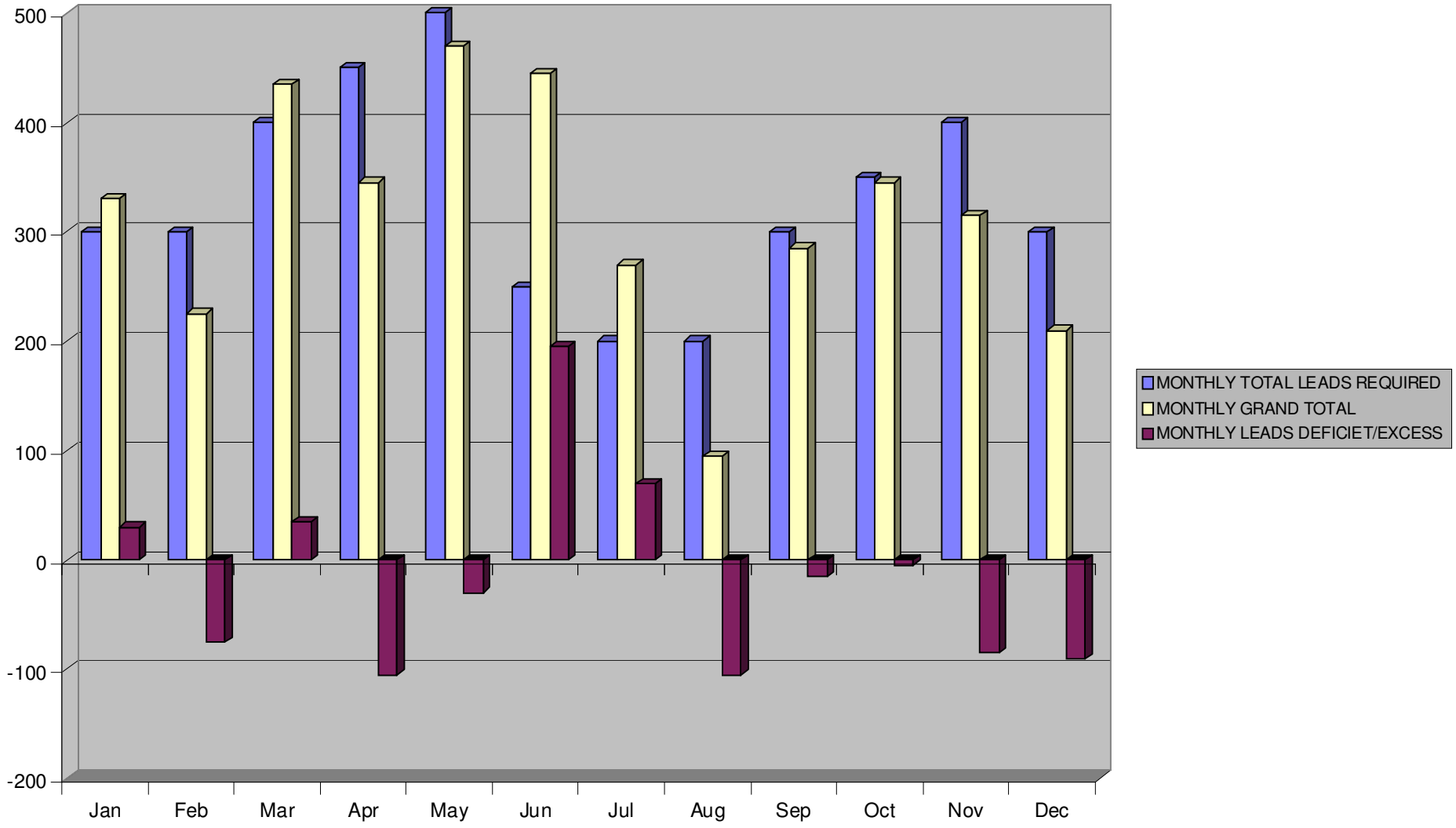

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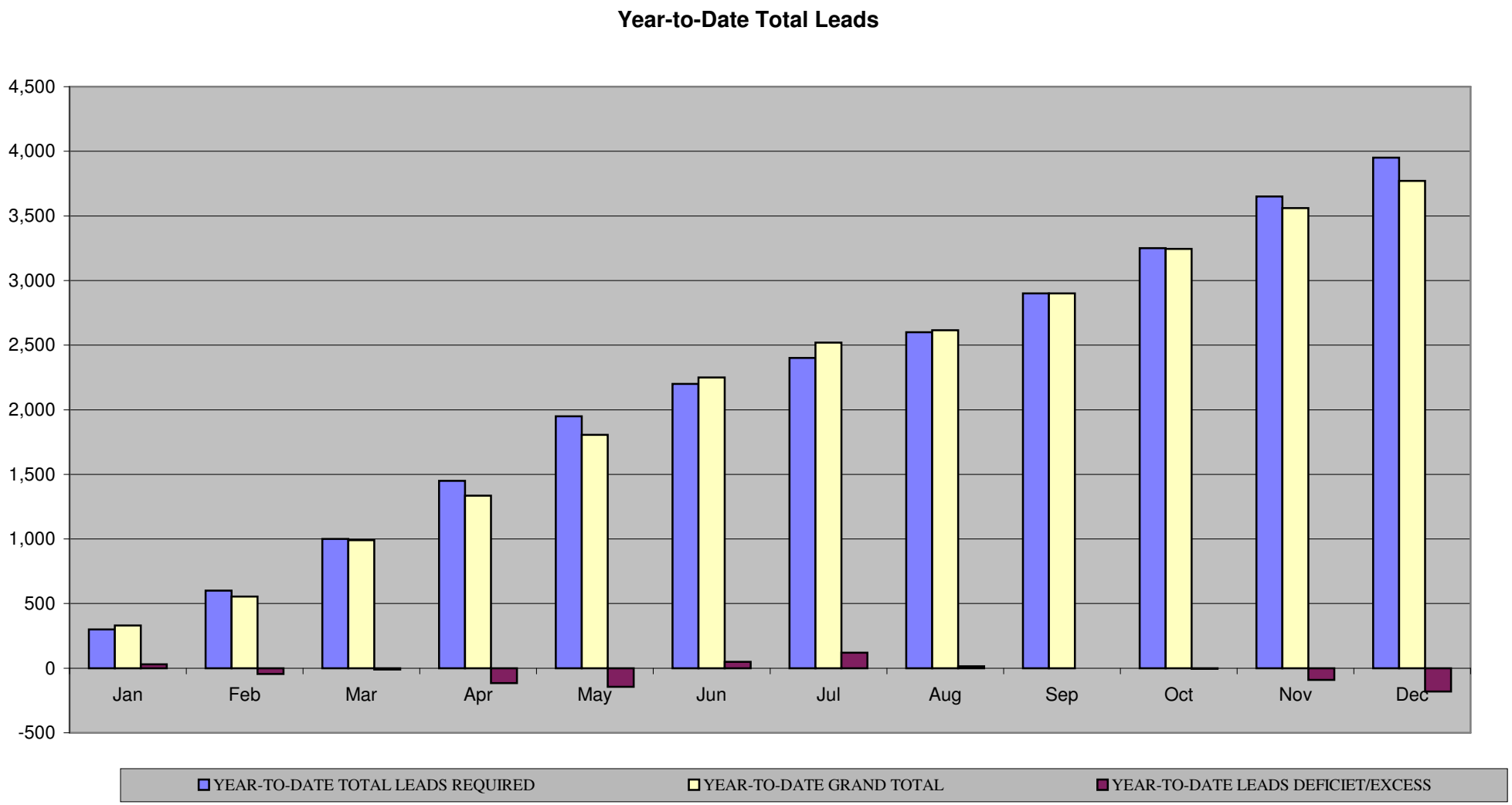
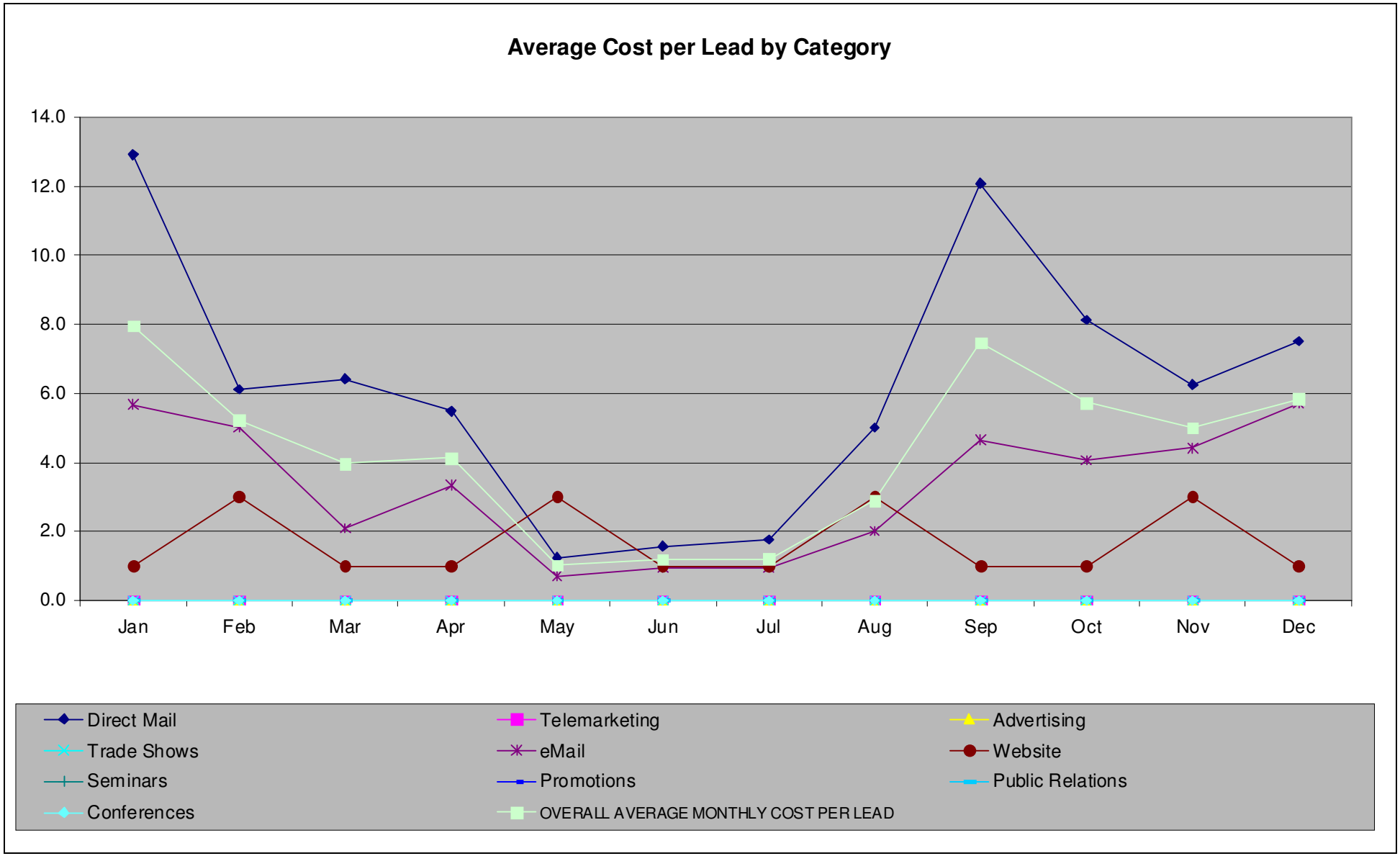

Year-to-Date Total Leads
4,500
4,000
3,500
3,000
2,500
2,000
1,500
1,000
500
0
-500
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
YEAR-TO-DATE TOTAL LEADS REQUIRED
YEAR-TO-DATE GRAND TOTAL
YEAR-TO-DATE LEADS DEFICIET/EXCESS


Average Cost per Lead by Category
14.0
12.0
10.0
8.0
6.0
4.0
2.0
0.0
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
Direct Mail
Telemarketing
Advertising
Trade Shows
eMail
Website
Seminars
Promotions
Public Relations
Conferences
OVERALL AVERAGE MONTHLY COST PER LEAD