Lead management process: from enquiry to paid invoice

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A lead management process is the agreed path an enquiry follows from first contact to paid invoice, so that none depends on someone remembering. In my experience, businesses that say they need more leads often have a lead-handling problem instead.

The seven stages

The standards below are suggested defaults. Adjust them to your market and capacity, then measure against what you set.

Stage	Outcome	Suggested default standard
Attract	The right people find a reason to enquire	One priority segment named
Capture	Every enquiry is recorded with its source	Source captured automatically
Acknowledge	The person knows it arrived and what happens next	First human reply within one working day
Qualify	You know if it is worth a proposal	Five questions asked on the first call
Propose	A clear scope and next step is sent	Proposal sent within a set number of days of the call
Win	Decision recorded, work agreed	Won or lost reason logged
Bill and learn	Invoice raised on the agreed trigger; lessons captured	Invoice on the agreed date, reviewed monthly

Capture the source when the enquiry arrives

Record where an enquiry came from at the point of capture, using hidden form fields that pass the source into your CRM. Do not try to reconstruct it later by tagging internal links, which mostly tells you how visitors moved around your own site. Ask people how they found you as well; the two answers often differ, and the gap is informative.

The minimum CRM fields

- Source
- Owner
- Stage
- Marketing email basis
- Key dates (received, first reply, last contact)
- Next step
- Loss reason

Seven groups of field, plus contact details and the enquiry message, are enough to run the process; the downloadable field map lists the individual columns behind them, marked Core. Add a field only when you can name the decision it changes. If you are weighing up software, read why CRM implementations fail first.

The useful part of the table is the right-hand column. If you cannot say what "done" looks like for a stage, nobody can tell whether it happened, and that stage is often where enquiries wait longest.

I have left out lead scoring and MQL/SQL definitions on purpose: at a handful of enquiries a month, an owner and a next step do more.

Acknowledge, qualify, follow up

A direct reply to someone's enquiry is generally a service message rather than marketing, as long as it answers what they asked and does not promote anything else. Marketing email is different. Someone who enquires has not necessarily agreed to it, and PECR treats company addresses and individuals (including sole traders and some partnerships) differently. Record the basis you rely on, check it with an adviser or the ICO's guidance, and give everyone a way to opt out. If you store source data in a cookie rather than reading it from the URL on the landing page, check whether cookie rules apply.

Storing enquirers' details in a CRM also means telling them how you use their data (a privacy notice) and keeping only what you need. The ICO's guidance is the place to check.

Ask the same five qualification questions on every first call:

1. What is prompting this now?
2. Who else is involved in the decision?
3. What happens if nothing changes?
4. What timing or budget range are you working within?
5. What would a good outcome look like?

For follow-up, agree a cadence in advance: for example, a second contact after a few working days, then a longer gap, then a closing note. The exact spacing matters less than having one owner and a logged next step.

Win, lose, bill, learn

Record why deals were won or lost, in the buyer's words where you can. Then invoice on the agreed trigger, whether that is signature, a milestone or a date. A late or missed invoice is rarely a finance problem; it is usually a handover nobody owned. Handover to billing is where enquiries quietly turn into unbilled work, so name who raises the invoice.

Once a month, review a short set of counts; B2B marketing KPIs for small volumes sets out which ones. Deals that stall between stages have a different set of causes, covered in why sales pipeline conversations stall.

What this will not fix

Software does not fix an unowned process. If nobody is named against each stage, a well-configured CRM will simply show you, more clearly, where things stop. The starting point is ownership; the tool comes second. This is the lead-to-billing work within marketing operations.

The workbook also includes a 15-check self-audit and a tracked-link builder.

Free downloads, no sign-up: the checklist and field map (XLSX), the field list as a CSV and this guide as a PDF.

Where to start

Pick the last five enquiries and trace each one to its outcome. Where the trail goes cold is your first fix. If you would like a second pair of eyes on it, a Strategic Marketing and Operations Review covers exactly this, and I'd be glad to compare notes.

Frequently asked questions

What is a lead management process?

It is the agreed path an enquiry follows from first contact to paid invoice: who replies, how it is qualified, when it is followed up, how it is won or lost, and when it is billed. Its purpose is that no enquiry depends on someone remembering.

What fields does a CRM need at minimum?

Seven groups of field, plus contact details and the enquiry message: source, owner, stage, marketing email basis, key dates, next step and loss reason. Anything beyond that should earn its place by changing a decision. Extra fields nobody fills in make the data less reliable, not more useful.

How quickly should I reply to an enquiry?

A sensible default is a first human reply within one working day. Treat that as a starting point to adjust for your own market and capacity, then measure whether you are meeting it. The standard matters less than having one and checking it.

Can I add enquiries to my marketing emails?

Not automatically. Someone who enquires has not necessarily agreed to marketing email. PECR treats company addresses and individuals (including sole traders and some partnerships) differently, so record the basis you rely on, check it with an adviser or the ICO's guidance, and give everyone a way to opt out.

This is a copy of the guide at chapmansconsulting.co.uk/insights/lead-management-process/. The web version is kept up to date; this copy is as at 29 September 2026. Free to share; please credit Chapman's Consulting.