

Lead Generation and Sales Pipeline Management Training Course

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Overview

Lead Generation and Sales Pipeline Management Training Course is a one-week intermediate course for B2B sales, marketing, business development, and revenue operations teams who leave with a Lead Generation and Pipeline Operating Playbook. Participants connect ideal customer profile design, permission-based sales prospecting, lead qualification and scoring, CRM pipeline stage governance, and sales pipeline forecasting to controlled revenue decisions. The course replaces fragmented handoffs and inconsistent records with a shared operating cadence. Agile Leaders Training Center presents lead lifecycle management practice.

Who Should Attend

- Functions responsible for defining target accounts and researching buying organizations
- Teams responsible for inbound and outbound lead capture, enrichment, and nurture
- Functions responsible for qualification, scoring, routing, and sales acceptance
- Teams responsible for CRM opportunity stages, pipeline hygiene, and forecasting
- Functions responsible for sales-marketing alignment, conversion analysis, and revenue operations

The course assumes participants manage prospects, campaigns, opportunities, or CRM records at work, and it leaves out basic selling skills, paid-media execution, and software administration.

Departments and Industries

The course supports departments and industries that generate, qualify, convert, and forecast business demand.

- B2B technology, professional services, industrial, and energy sales organizations
- Marketing, demand generation, growth, and campaign operations departments
- Sales, business development, account development, and channel teams
- Revenue operations, CRM governance, analytics, and commercial planning functions
- Customer success and service teams that identify expansion opportunities

Learning Objectives

By the end of this course, participants will be able to:

- Build ideal customer profiles and target-account criteria
- Apply permission-based prospecting and lead-capture controls
- Analyze fit, intent, qualification, and scoring evidence
- Design routing, acceptance, and sales-marketing handoff rules
- Evaluate pipeline quality, aging, conversion, and coverage
- Use stage evidence to build a sales forecast

Course Agenda

Day 1: Define the Target Market

- Ideal Customer Profile Design Canvas
- Buying Committee and Influence Map
- Total Addressable Account Selection Matrix
- Firmographic, Technographic, and Intent Data Plan
- Target-Account Research and Data-Quality Checklist

Day 2: Generate and Capture Leads

- Permission-Based Prospecting Workflow
- Inbound and Outbound Source Portfolio Map
- Lead Capture and Consent Record Standard
- Account and Contact Enrichment Procedure
- Prospecting Sequence and Touchpoint Log

Day 3: Qualify, Score, and Route

- Fit, Need, Authority, and Timing Qualification Matrix
- Behavioral Intent and Engagement Scoring Model
- Marketing-Qualified and Sales-Accepted Lead Criteria
- Territory, Capacity, and Account-Ownership Routing Rules
- Lead Recycle, Disqualification, and Audit-Trail Method

Day 4: Govern the Sales Pipeline

- Opportunity Stage Entry and Exit Criteria
- CRM Pipeline Hygiene and Required-Field Checklist
- Pipeline Aging, Velocity, and Conversion Dashboard
- Coverage, Weighted Value, and Forecast Calculation Sheet
- Sales-Marketing Handoff and Review Cadence

Day 5: Practice Pipeline Decisions

- Suggested Exercise: Rank Target Accounts and Buying Roles
- Suggested Exercise: Qualify and Score a Mixed Lead Queue
- Suggested Exercise: Route, Accept, and Recycle Lead Records
- Suggested Exercise: Diagnose Pipeline Leakage and Forecast Risk
- Capstone Exercise: Complete the Lead Generation and Pipeline Operating Playbook

Practical Exercises

The course uses suggested activities to turn prospect and opportunity evidence into controlled revenue decisions.

- Suggested activity: build an ideal customer profile and rank accounts against fit and intent criteria.
- Suggested activity: apply qualification, scoring, routing, and recycle rules to a mixed lead queue.
- Suggested activity: audit opportunity records against stage evidence, aging, and required fields.
- Suggested activity: defend a forecast using conversion, coverage, velocity, and deal-level evidence.

FAQs

Who suits lead generation and sales pipeline management training, and what does it assume?

B2B sales, marketing, business development, account development, and revenue operations teams suit the course. It assumes participants work with prospects, campaigns, opportunities, or CRM data.

How does sales pipeline management differ from general selling skills training?

Sales pipeline management governs records, stages, qualification, routing, conversion, aging, coverage, and forecasting. General selling skills training concentrates on conversations, discovery, presenting value, objection handling, negotiation, and closing behavior.

What makes an effective lead qualification model?

An effective lead qualification model combines account fit, business need, buyer authority, timing, engagement, and evidence quality. It also defines acceptance, disqualification, recycle, ownership, and audit rules.

How should sales pipeline stages be governed?

Sales pipeline stages should use observable entry and exit criteria, required evidence, ownership, next actions, aging limits, and review routines. Stage movement should reflect buyer progress rather than seller optimism.

How is a sales pipeline forecast built?

A sales pipeline forecast combines stage evidence, deal value, probability, timing, historical conversion, aging, coverage, risks, and committed next steps. Teams challenge unsupported assumptions and keep forecast categories consistent.

Conclusion

Participants take back a Lead Generation and Pipeline Operating Playbook linking target accounts, prospecting, qualification, scoring, routing, stages, measures, and forecasts. It changes disconnected lead activity into one traceable commercial workflow. Teams can update the playbook as markets, channels, capacity, and conversion evidence change.

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