Sales Leads Generation Plan & Budget MS-Excel Template User Guide

Excel spreadsheet

The Lead Generation Plan & Budget Template allows the user to quickly generate 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 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.

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Introduction

The Lead Generation Plan & Budget Template allows the user to quickly generate 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 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.

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.

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.

USER INSTRUCTIONS

The EXCEL model has a simple Push Button Menu system at the top of the Workbook in cell A2. (figure 1) 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.

Figure 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. 2011 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.**

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 figure 2 below provides an example of a typical Campaign set-up.

Select Menu Option 4 to enter the Number of Leads for each Campaign for **each month. (see figure 3 below)**

Select Menu Option 5 to enter the budget for each Campaign for **each month. (see figure 4 below)**

Figure 2

Calculations

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.

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.

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 example 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 example below).

My Big Company Ltd Lead Generation Schedule for Year Starting 1st Jan 2006											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
LEAD GENERATION CATEGORIES											
Direct Mail											
Direct Mail 1	30	30	30	0	0	0	0	0	0	0	0
Direct Mail 2	0	0	0	20	20	20	20	0	0	0	0
Direct Mail 3	0	0	0	0	0	0	15	20	25	10	10
Direct Mail 4	0	0	0	0	0	0	0	0	0	30	30
Direct Mail 5	0	0	0	0	0	0	0	0	0	0	0
Campaign 6	0	0	0	0	0	0	0	0	0	0	0
Campaign 7	0	0	0	0	0	0	0	0	0	0	0
Campaign 8	0	0	0	0	0	0	0	0	0	0	0
Campaign 9	0	0	0	0	0	0	0	0	0	0	0
Campaign 10	0	0	0	0	0	0	0	0	0	0	0
Monthly Leads from Direct Mail	**30**	**30**	**30**	**20**	**20**	**20**	**35**	**20**	**25**	**40**	**40**
Y-To-D Leads from Direct Mail	**30**	**60**	**90**	**110**	**130**	**150**	**185**	**205**	**230**	**270**	**310**
Telemarketing											
Small Business Campaign	25	20	20	0	0	0	0	0	0	0	0
Hi tech industry Campaign	0	0	0	20	20	30	0	0	0	0	0
New Product Launch	0	0	0	0	0	0	20	20	20	20	15
Telemarketing Campaign X	0	0	0	0	0	0	0	0	0	0	0
Campaign 5	0	0	0	0	0	0	0	0	0	0	0
Campaign 6	0	0	0	0	0	0	0	0	0	0	0
Campaign 7	0	0	0	0	0	0	0	0	0	0	0
Campaign 8	0	0	0	0	0	0	0	0	0	0	0
Campaign 9	0	0	0	0	0	0	0	0	0	0	0
Campaign 10	0	0	0	0	0	0	0	0	0	0	0
Monthly Leads from Telemarketing	**25**	**20**	**20**	**20**	**20**	**30**	**20**	**20**	**20**	**20**	**15**
Y-To-D Leads from Telemarketing	**25**	**45**	**65**	**85**	**105**	**135**	**155**	**175**	**195**	**215**	**230**

Figure 3 Number of Leads

My Big Company Ltd Lead Generation Budget for Year Starting 1st Jan 2006											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
LEAD GENERATION CATEGORIES											
Direct Mail											
Direct Mail 1	$100.00	$100.00	$100.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Direct Mail 2	$0.00	$0.00	$0.00	$50.00	$50.00	$50.00	$50.00	$0.00	$0.00	$0.00	$0.00
Direct Mail 3	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$20.00	$20.00	$10.00	$0.00	$0.00
Direct Mail 4	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$30.00	$30.00
Direct Mail 5	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Campaign 6	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Campaign 7	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Campaign 8	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Campaign 9	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Campaign 10	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Monthly Budget for Direct Mail	**$100.00**	**$100.00**	**$100.00**	**$50.00**	**$50.00**	**$50.00**	**$70.00**	**$20.00**	**$10.00**	**$30.00**	**$30.00**
Y-To-D Budget for Direct Mail	**$100.00**	**$200.00**	**$300.00**	**$350.00**	**$400.00**	**$450.00**	**$520.00**	**$540.00**	**$550.00**	**$580.00**	**$610.00**
Telemarketing											
Small Business Campaign	$50.00	$40.00	$50.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Hi tech industry Campaign	$0.00	$0.00	$0.00	$25.00	$25.00	$25.00	$0.00	$0.00	$0.00	$0.00	$0.00
New Product Launch	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$20.00	$20.00	$20.00	$0.00	$0.00
Telemarketing Campaign X	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Campaign 5	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Campaign 6	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Campaign 7	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Campaign 8	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Campaign 9	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Campaign 10	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Monthly Budget for Telemarketing	**$50.00**	**$40.00**	**$50.00**	**$25.00**	**$25.00**	**$25.00**	**$20.00**	**$20.00**	**$20.00**	**$0.00**	**$0.00**
Y-To-D Budget for Telemarketing	**$50.00**	**$90.00**	**$140.00**	**$165.00**	**$190.00**	**$215.00**	**$235.00**	**$255.00**	**$275.00**	**$275.00**	**$275.00**
Advertising											

Figure 4 Lead Budget

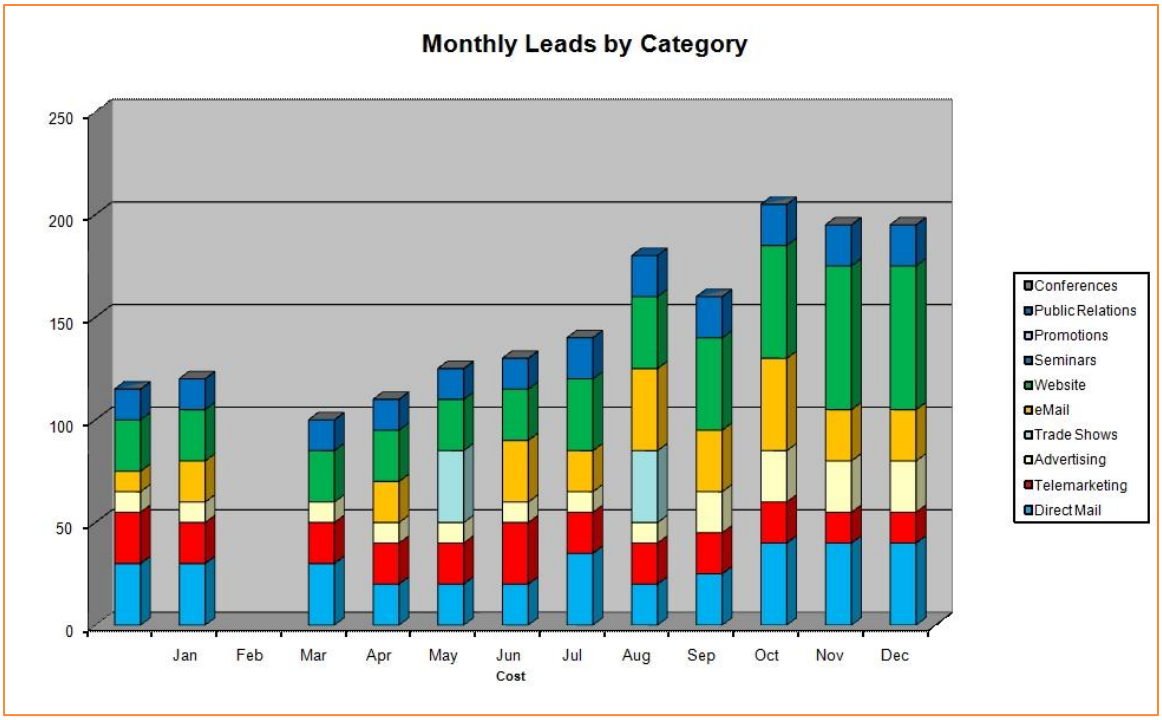
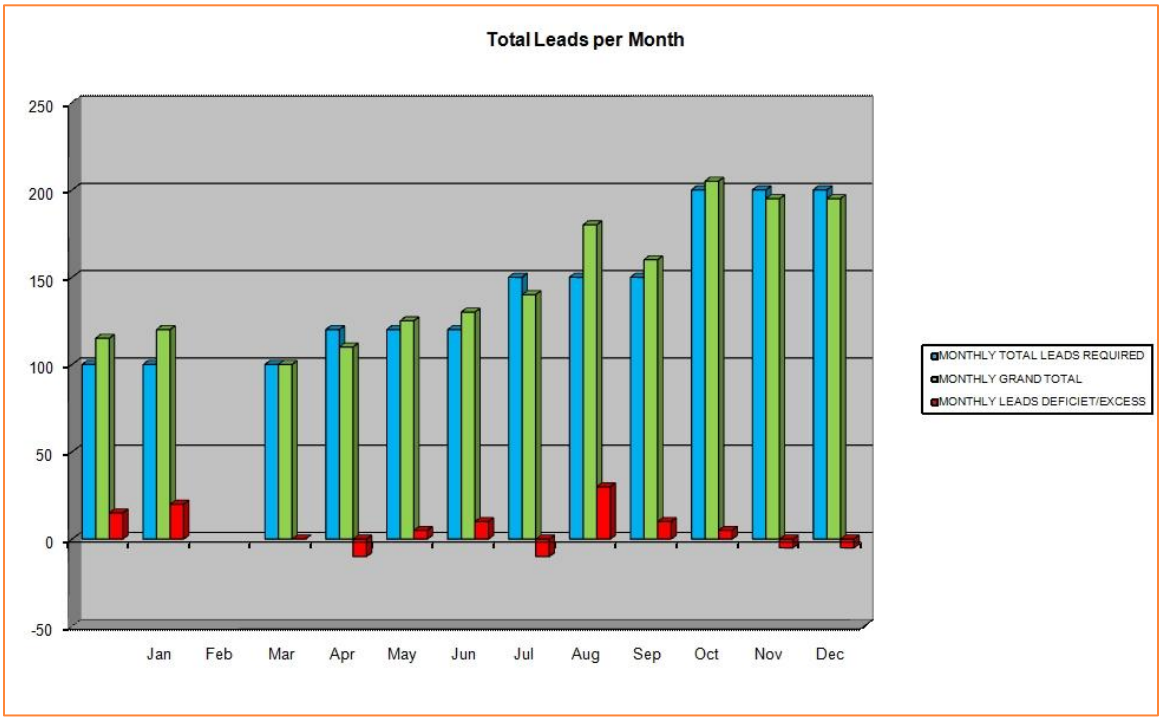


Figure 5



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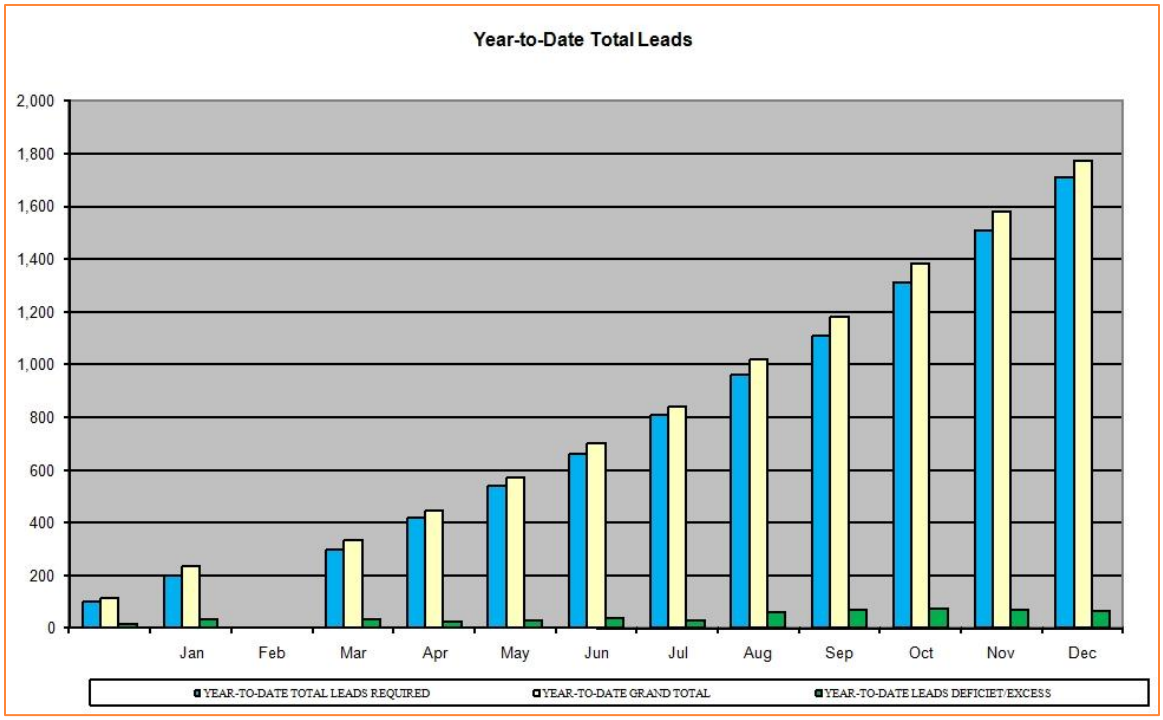

Figure 7

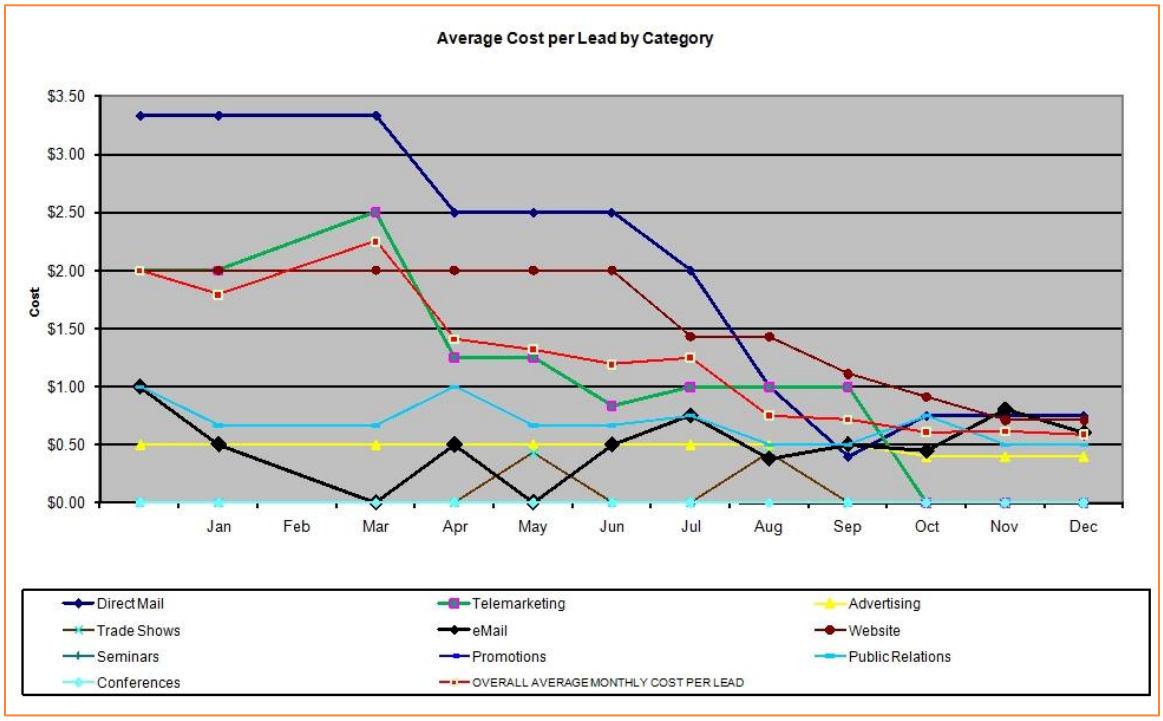

Figure 8