The lead-to-sale journey
Guide and templates by industry
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The lead-to-sale journey represents all of the events that gradually process and qualify inbound leads into a paying customer. The number of events, sales conversion rates and timelines for the journey varies per business.

- **Lead**: 4,000 leads per month
- **Marketing qualified lead**: 200 MQLs per month
- **Sales qualified lead**: 100 SQLs per month
- **Closed deal**: 25 deals per month

Conversion rates:
- 5% conversion rate
- 50% conversion rate
- 25% conversion rate

Timelines:
- 2 days
- 7 days
- 14 days
Integrating the lead-to-sale journey drives...

+20% incremental revenue

+30% cost efficiency

when integrating strategies with customer data across the whole lead journey.
Conversion value

1. Map the average value of your final sale or cLTV:

Depending on your business, it can be either the value for each final sale or the expected customer lifetime value (cLTV).

$3,200 value per deal
Conversion value

2. Identify your conversion rate (SQL to Sales)

$3,200 value per deal
3. Calculate the expected value:

Retroactively multiply your final sale or LTV by your conversion rate and you'll get the expected value for the event that precedes the final conversion action.
Conversion value

Marketing qualified lead → Sales qualified lead → Closed deal

**Expected value:**
Your best estimate of how much money each event will create for your business. It could be the immediate profits, the forecasted CLV profits, or profits based on a lead scoring algorithm.

- **$800 expected value per SQL**
- **$3,200 value per deal**

Conversion value

Depending on your business, it can be either the value for each final sale or the expected customer lifetime value.

$3,200 (value of each closed deal) × 25% (conversion rate)
The lead-to-sale journey (with values)

- **Lead**
  - 4,000 leads per month
  - $20 value per Lead
  - 5% conversion rate

- **Marketing qualified lead**
  - 200 MQLs per month
  - $400 value per MQL
  - 50% conversion rate

- **Sales qualified lead**
  - 100 SQLs per month
  - $800 value per SQL
  - 25% conversion rate

- **Closed deal**
  - 25 deals per month
  - $3,200 value per deal
Templates by industry

- EDUCATION
- TRAVEL
- CAR SALES
- FINANCE
- REAL ESTATE
- HEALTHCARE
- B2B SOFTWARE
- MORTGAGES
- LAW FIRMS
- JOB RECRUITING
- INSURANCE
- LOANS
Numbers in blue are examples: customize the journey (event volume, value and # of events) based on your own business data.

<table>
<thead>
<tr>
<th>Event</th>
<th>Online</th>
<th>Offline</th>
<th>Offline</th>
<th>Offline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request info</td>
<td>4,000 requests per month</td>
<td>$312 value per request</td>
<td>200 applications per month</td>
<td>$6,250 value per application</td>
</tr>
<tr>
<td>Application started</td>
<td>200 applications per month</td>
<td>$6,250 value per application</td>
<td>100 completed apps per month</td>
<td>$12,500 value per application</td>
</tr>
<tr>
<td>Application completed</td>
<td>100 completed apps per month</td>
<td>$12,500 value per application</td>
<td>25 deals per month</td>
<td>$50,000 value per enrollment</td>
</tr>
<tr>
<td>Student enrolled</td>
<td>25 deals per month</td>
<td>$50,000 value per enrollment</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Online**: 5% conversion rate, 1 days
- **Offline**: 50% conversion rate, 2 days
- **Offline**: 25% conversion rate, 14 days
Travel

Numbers in blue are examples: customize the journey (event volume, value and # of events) based on your own business data.

- Online sales: 5,000 quotes per month, $200 value per quotes
- Sales call: 4,000 calls per month, $250 value per call
- Final quote submitted: 2,000 quotes per month, $500 value per application
- Trip booked: 200 bookings per month, $5000 value per booking

- 80% conversion rate for online sales
- 50% conversion rate for sales call
- 10% conversion rate for final quote submitted

- 2 days for online sales
- 4 days for sales call
- 10 days for final quote submitted
Car sales

Numbers in blue are examples: customize the journey (event volume, value and # of events) based on your own business data.

Visit scheduled
- 7,000 visits booked per month
- $32 per booked visit

Dealership visit
- 2,100 visits per month
- $106 per visit

Offer accepted
- 105 offers per month
- $2,137 per offer accepted

Financial approval
- 95 approvals per month
- $2,375 per approval

Car sold
- 90 sales per month
- $2,500 per sale

Conversion rates:
- 80% conversion rate to visit scheduled
- 50% conversion rate to dealership visit
- 10% conversion rate to offer accepted
- 10% conversion rate to financial approval
- 10% conversion rate to car sold

Timeframes:
- 2 days from visit scheduled to dealership visit
- 4 days from dealership visit to offer accepted
- 10 days from offer accepted to financial approval
- 10 days from financial approval to car sold
Banking

Numbers in blue are examples: customize the journey (event volume, value and # of events) based on your own business data.

- **Online**: Request info
  - 5,000 forms per month
  - $26 value per form
  - 40% conversion rate
  - 1 days

- **Offline**: Application started
  - 2,000 applications per month
  - $64 value per application
  - 20% conversion rate
  - 3 days

- **Offline**: Application completed
  - 400 approvals per month
  - $320 value per approval
  - 40% conversion rate
  - 7 days

- **Offline**: Account created
  - 160 accounts per month
  - $800 value per account
Real estate

Numbers in blue are examples: customize the journey (event volume, value and # of events) based on your own business data.

Visit scheduled
- 5,000 schedulings per month
- $90 per scheduled visit

House visit
- 2,500 visits per month
- $180 per visit

Offer made
- 125 offers per month
- $3,600 per offer accepted

Financial approval
- 100 approvals per month
- $4,500 per approval

House purchased
- 90 sales per month
- $5,000 per sale

50% conversion rate
- 3 days

5% conversion rate
- 4 days

80% conversion rate
- 7 days

90% conversion rate
- 21 days
B2B software

Numbers in blue are examples: customize the journey (event volume, value and # of events) based on your own business data.

- **700** sign ups per month
  - **48** value per forms
- **210** demos per month
  - **120** value per application
- **105** SQLs per month
  - **600** value per approval
- **42** contracts per month
  - **1,500** value per contract

- **40%** conversion rate
- **< 1 days**
- **20%** conversion rate
- **2 days**
- **40%** conversion rate
- **9 days**
Mortgages

Numbers in blue are examples: customize the journey (event volume, value and # of events) based on your own business data.

- **Online**
  - Info request
  - 20,000 Requests per month
  - $160 per request

- **Offline**
  - Credit check
  - 16,000 Approvals per month
  - $160 per approval

  - Sales qualification
  - 800 SQLs per month
  - $3,150 per SQL

  - Formal contract
  - 240 Contracts per month
  - $10,500 per contracts

  - Underwriting
  - 170 Sales per month
  - $15,000 per sale

Conversion rates:
- 80% conversion rate
- 5% conversion rate
- 30% conversion rate
- 70% conversion rate

Timeframes:
- 1 day
- 5 days
- 14 days
- 21 days
Law firms

Numbers in blue are examples: customize the journey (event volume, value and # of events) based on your own business data.

Information submitted
- 2,000 Submissions per month
- $230 Value per request

Talk with paralegal
- 1,200 Calls per month
- $382 Value per application

Attorney assigned
- 60 Assignments per month
- $7,650 Value per approval

Case closed
- 54 Contracts per month
- $8,500 Value per case

Conversion rates:
- < 1 days: 60% conversion rate
- 2 days: 5% conversion rate
- 40 days: 90% conversion rate
Job recruiting (business as clients)

Numbers in blue are examples: customize the journey (event volume, value and # of events) based on your own business data.

Online

Requests for trial
2,300 Sign-ups per month
$95 Value per request

Trials
670 Demos per month
$316 Value per application

Sales qualified leads
267 SQLs per month
$792 Value per approval

Subscription enabled
80 Contracts per month
$2,640 Value per case

Online

1 days

30% conversion rate

3 days

40% conversion rate

7 days

30% conversion rate
Insurance

Numbers in blue are examples: customize the journey (event volume, value and # of events) based on your own business data.

Online application: 30,000 requests per month, $90 per request
Pre-approval: 15,000 approvals per month, $100 per approval
Sales qualification: 750 SQLs per month, $2,000 per SQL
Policy offer: 225 contracts per month, $6,700 per contract
Underwriting: 160 policies per month, $9,500 per policy

Conversion rates:
- Online application: 80% conversion rate, 1 day
- Pre-approval: 5% conversion rate, 3 days
- Sales qualification: 30% conversion rate, 7 days
- Policy offer: 70% conversion rate, 18 days
Loans

Numbers in blue are examples: customize the journey (event volume, value and # of events) based on your own business data.

<table>
<thead>
<tr>
<th>Step</th>
<th>Online</th>
<th>Offline</th>
<th>Offline</th>
<th>Offline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request quote</td>
<td>5,000 quotes per month</td>
<td>2,000 applications per month</td>
<td>400 approvals per month</td>
<td>160 loans per month</td>
</tr>
<tr>
<td></td>
<td>$26 value per quote</td>
<td>$64 value per application</td>
<td>$320 value per approval</td>
<td>$800 value per account</td>
</tr>
<tr>
<td>Application started</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial approval</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Loan accepted</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Conversion rates:
- 40% conversion rate
- 20% conversion rate
- 40% conversion rate

Timelines:
- 1 days
- 7 days
- 11 days
Healthcare

Numbers in blue are examples: customize the journey (event volume, value and # of events) based on your own business data.

- **Sign up**: 5,000 sign-ups per month, $27 per sign-up
- **Consultation requested**: 2,500 requests per month, $54 per request
- **Sales qualification**: 125 SQLs per month, $1,080 per SQL
- **Scheduled appointment**: 100 appointment per month, $1,350 per appointment
- **Initial consultation**: 90 consultations per month, $1,500 per consultation

- **Conversion rates**: 50% conversion rate, 5% conversion rate, 80% conversion rate, 90% conversion rate
- **Timelines**: < 1 days, < 1 days, < 1 days, 7 days

Google
Take action

Make a copy of the template that best represents your business, adapt it and share it with your Google team.

Lead
- W Leads per month
- $A value per leads

Marketing qualified lead
- X MQLs per month
- $B value per MQL

Sales qualified lead
- Y SQLs per month
- $C value per SQL

Closed deal
- Z deals per month
- $D value per deal

M% conversion rate
- P days

N% conversion rate
- Q days

O% conversion rate
- R days

Make sure to adapt all fields in blue to values that reflect your business performance.