

CHECKLIST

Lead-to-SAL ratio checklist

For marketing and sales leaders at IT and technology companies

Lead-to-SAL ratio is the share of marketing leads that sales accepts. Use this checklist to set it up, read it by source and run it every month.

Owner _____

Start date _____

Review date _____

1. Agree the definitions

- ☐ Write down what counts as a lead, an MQL, a SAL and an SQL, and who decides each.
- ☐ Set a time limit for sales to accept or reject a lead (for example two working days).
- ☐ Create rejection reason codes: not a fit, duplicate, student or job seeker, competitor, wrong region, existing customer, no response.
- ☐ Sign off the definitions with the head of sales and keep them fixed.

2. Measure it properly

- ☐ Calculate: sales-accepted leads divided by marketing leads, same period and same source.
- ☐ Group leads by the month they were created (cohorts).
- ☐ Report by source: search, LinkedIn, email, events and referrals.
- ☐ Remove test, spam and existing-customer submissions from the lead count.
- ☐ Add cost per lead and cost per SAL for paid sources.

3. Fix the handover

- ☐ Route every lead to a named owner by region or service line.
- ☐ Alert the owner by email or chat as soon as the lead arrives.
- ☐ Send context with each lead: source, page, what the person did.
- ☐ Measure time to accept, and review it weekly.

4. Diagnose and act

- ☐ Many leads, few accepted: tighten targeting and the offer, add fit questions.
- ☐ Rejected as not a fit: rewrite the fit definition with sales.
- ☐ Accepted late: add the time limit and alerts.
- ☐ Good leads go cold: build role-based nurture tracks.
- ☐ Ratio falls as volume rises: check the ratio by source before scaling.

5. Run it every month

- ☐ Send a one-page report: leads and SALs by source, cost per SAL, time to accept, rejection reasons.
- ☐ Agree three actions with owners.
- ☐ Shift budget toward sources with the best cost per SAL.
- ☐ Review definitions quarterly with sales.

NUMBERS TO REMEMBER

4.12% lead-to-SAL overall at month 12 in our top-5 IT company case, up from 0.22%.

SEO leads were accepted at 4.37%, search campaigns at 2.12%.

Aim to compare against your own history by source, not against a single industry figure.

Want a second pair of eyes? Book a free 30-minute pipeline review. We will look at your funnel and show you what we would change first. info@search-value.com | search-value.com/lead-to-sal-ratio