

MERCHANT SERVICES LEAD GENERATION CHECKLIST

Build a more measurable lead-generation process.

Define your ideal customer, target the right markets, qualify and verify prospects, set a follow-up SLA, and measure the sales funnel.

HOW TO USE THIS CHECKLIST

Complete the targeting and qualification sections before generating or purchasing a large volume of leads. Then define your follow-up SLA and baseline your sales KPIs. The goal is not simply more leads—it is a process that produces measurable conversations, appointments and closed accounts.

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RESOURCE
Lead Generation

1. Define Your Ideal Customer Profile (ICP)

- **Define the business types you want.**
Examples: retail, restaurants, professional services, e-commerce, healthcare, automotive, etc.
- **Define business size or revenue range.**
Set a practical minimum/maximum based on your offer.
- **Define payment-processing fit.**
Consider transaction volume, card acceptance, POS/e-commerce needs, or other qualification criteria.
- **Define decision-maker roles.**
Owner, founder, CFO, operations manager, payments manager, or another relevant contact.

2. Select Geography

- **Target states / regions.**
Write down your priority territory.
- **Target cities / ZIP codes.**
Narrow the territory where useful.
- **Confirm territory capacity.**
Make sure your team can work the geographic volume you select.

3. Select Industries

- **Choose priority industries.**
Separate primary industries from secondary test segments.
- **Document exclusions.**
Identify industries or business models you cannot or do not want to serve.

4. Define Lead Qualification

- **Define what makes a lead qualified.**
Specify required fields, business status, location, industry, contact role, and buying/processing intent where applicable.
- **Separate “contactable” from “qualified.”**
A valid phone number does not automatically mean the prospect fits your ICP.
- **Define rejection criteria.**
Document duplicate, out-of-area, wrong-industry, invalid-contact, and other disqualifying conditions.

5. Verify Contact Data

- **Verify phone numbers.**
Track connectivity separately from lead qualification.
- **Verify email addresses.**
Do this where email is part of the outreach plan.
- **Check for duplicates and stale records.**
- **Record verification date or freshness window.**

6. Determine Lead Delivery Speed

- **Choose delivery cadence.**
Real-time, daily, weekly, or batch delivery should match your team's follow-up capacity.
- **Set a maximum workable lead volume.**
More leads are not useful if your team cannot contact them promptly.

7. Establish a Follow-Up SLA

- **Set the first-contact target.**
Define how quickly a new lead should receive first contact according to your process and applicable rules.
- **Define the follow-up sequence.**
Document attempts, channels, spacing, ownership, and when a lead is marked closed/unresponsive.
- **Assign ownership.**
Every lead should have a clear salesperson or queue owner.

8. Measure the Funnel

- **Contact Rate.**
 $\text{Connected leads} \div \text{leads attempted} \times 100$
- **Appointment Rate.**
 $\text{Appointments} \div \text{connected leads} \times 100$
- **Close Rate.**
 $\text{Closed accounts} \div \text{qualified opportunities} \times 100$

- Track results by source, industry, geography, and salesperson.
- Measure cost per contacted lead, appointment, and closed account.

9. Weekly Lead Program Review

- **Identify the best-performing segment.**
Which industry, geography, or lead source produces the strongest downstream result?
- **Identify the weakest segment.**
Decide whether to improve targeting, change the offer, adjust follow-up, or stop the segment.
- **Update your ICP based on actual sales data.**

Quick Planning Notes

Primary industries	_____
Geography	_____
Revenue / size range	_____
Qualification rules	_____
Follow-up SLA	_____
Weekly KPI review	_____

READY FOR QUALIFIED MERCHANT PROSPECTS?

Explore Merchant Account Leads from Leadscampus.

leadscampus.com/merchant-account-leads/

Leadscampus — Lead generation, data verification and sales intelligence resources.

Use this worksheet as an internal planning tool. Qualification, outreach, consent and contact practices should be adapted to applicable laws, regulations, platform policies and internal compliance requirements.