



A Simple Audit to Validate Your Lead Generation System

Before you chase another tactic, test whether you actually have a system worth scaling.

LEAD GENERATION

SYSTEM VALIDATION

Most B2B Leaders Believe They Have Lead Gen Figured Out

They get referrals. They post content. They run the occasional campaign.

But when you ask a harder question—**"Do we reliably generate new interest every month?"**—the answer gets fuzzy.

This audit exists to remove the guesswork.

It verifies whether your lead generation is system-driven or accidental—before you invest more time, budget, or complexity.

Why This Audit Was Developed

Channels exist, but they aren't intentional

Activity happens across LinkedIn, referrals, and events—but no clear strategy guides where effort goes.

Offers exist, but they aren't clear or compelling

Prospects see "learn more" or "schedule a call" without understanding the specific value or outcome.

Activity exists, but consistency does not

Campaigns launch with energy, then fade. Results spike one month and vanish the next.

When any one of those breaks, lead flow becomes unpredictable. This audit checks whether you have a **real system**—not just effort.

Who This Audit Is For

This audit is designed for:

- B2B founders and CEOs responsible for sustainable growth
- Service-based firms seeking predictable pipeline
- Fractional leaders (CFO, COO, CMO) building systems
- Marketing and sales teams responsible for pipeline health

❑ What this is NOT:

This is not a demand-gen strategy. It is not a campaign checklist. It is a **monthly reliability check.**



The Principle Behind the Audit



Small Number of Channels

Focus beats fragmentation. One or two intentional channels outperform five scattered ones.

If any one of those is missing, results spike—and then disappear. This audit verifies whether the system holds together under normal conditions.

Clear Reason to Engage

Prospects need a specific, low-risk way to raise their hand and take the next step.

Consistent Execution

Reliability comes from repeatable cadence, not heroic monthly sprints.

💼 RUNNING EXAMPLE

Fictional Fractional CFO Firm

"We usually get new leads every month."

We'll use this fictional firm throughout the audit to illustrate how belief gets tested against reality.

The audit will reveal whether that confidence is **system-driven or accidental** —and what adjustments create genuine reliability.



Lead Generation System Audit (B2B)

Purpose

Validate whether you have a reliable, repeatable way to generate new interest every month.

When to Use

Monthly, or before increasing spend or changing tactics.

Ownership

Owner: _____

Last Updated: _____

Lead Channels (5 Points)

- List all active channels that generate inbound interest**
Include referrals, content marketing, paid ads, partnerships, events, and direct outreach.
- Identify 1–2 primary channels responsible for most leads**
Where do the majority of qualified prospects actually come from?
- Confirm these channels are owned, not purely opportunistic**
Can you control the input, or do leads only arrive when conditions align?
- Know which channel produced your last 5 leads**
This tests whether tracking exists and whether patterns are visible.
- Have intentionally stopped or deprioritized at least one channel**
Focus requires saying no. If everything is active, nothing is strategic.

Lead Offers (5 Points)

- **Have a clear offer tied to each primary channel**

What specifically are you inviting prospects to do?

- **The offer solves a specific problem, not "learn more"**

Generic language creates generic response rates.

- **The next step requires low commitment for prospects**

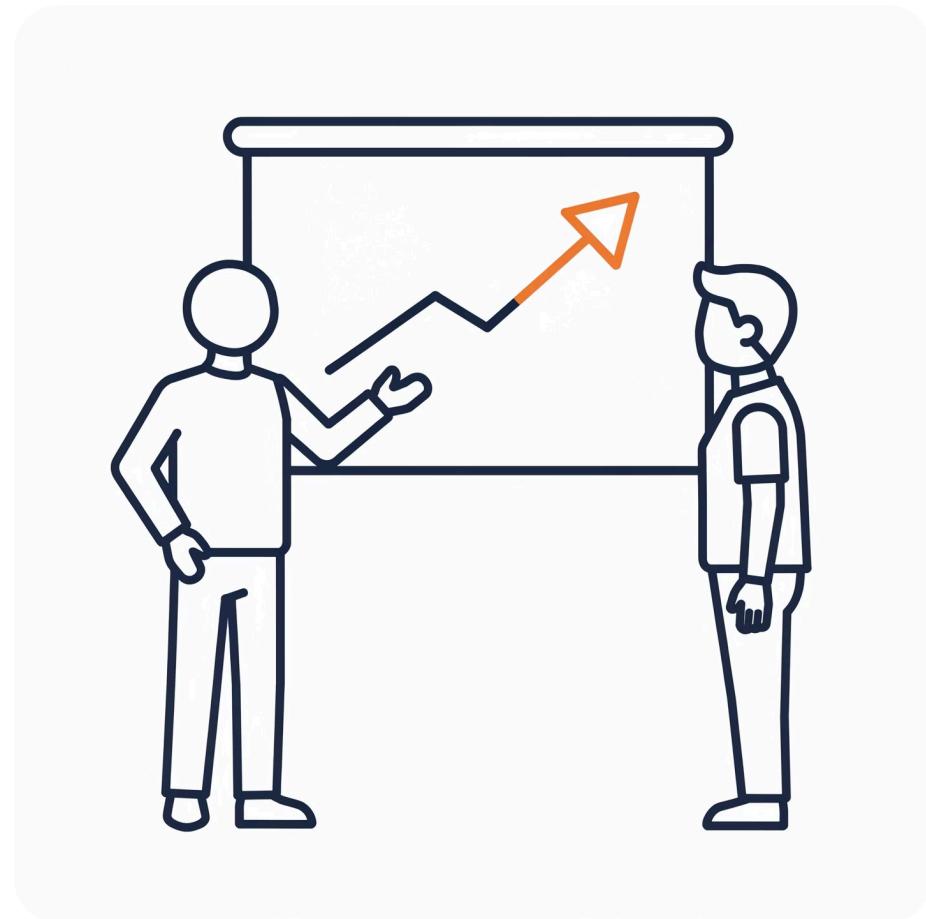
High-friction offers slow momentum, even for interested buyers.

- **Prospects clearly understand what they get after opting in**

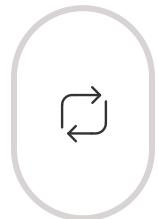
Ambiguity creates hesitation. Clarity creates action.

- **The offer has been used or tested in the last 60 days**

Untested offers are assumptions, not systems.



Consistency & Cadence (4 Points)



Lead activities run on a defined cadence

Weekly or monthly rhythms prevent "whenever we remember" execution.



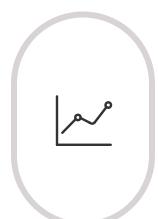
Responsibility for lead generation is clearly owned

Shared accountability often means no one is actually accountable.



Missed weeks or months are visible, not ignored

Gaps should trigger conversation, not excuse-making.



Results are reviewed on a regular schedule

Systems improve through measurement, not hope.

SECTION 4

Reliability Test (1 Point — Pass / Fail)

“**Can you confidently say:**
"We generate new qualified interest every month without starting from scratch."

If the answer is no—or if there's hesitation—the system is not yet reliable. That's the signal to simplify and stabilize before scaling.



Scoring Model (15 Points Total)

How to Score

- Each checked item = **1 point**
- Section 4 = pass / fail (1 point if pass, 0 if fail)
- If a box is unclear, score it **0**

Honest scoring reveals reality. Optimistic scoring protects broken systems.

15

Total Points

Maximum possible score across all four sections

Score Interpretation (Stoplight Model)

Green (12–15)

Reliable

Your system generates predictable results. Protect what's working and optimize incrementally.

Yellow (8–11)

Inconsistent

Lead flow exists but isn't dependable. Simplify channels, clarify offers, and stabilize cadence before adding complexity.

Red (0–7)

Unreliable

The system is broken or doesn't exist yet. Rebuild from the ground up—don't layer tactics on top of instability.

- Critical guidance:** If your score is yellow or red, do not add new tactics yet. More activity on a weak foundation creates noise, not results.



Practical Application: Fictional Fractional CFO Firm

1

What They Believed

"Referrals and LinkedIn usually bring in leads."

2

What the Audit Revealed

- Referrals worked—but were **not predictable**
- LinkedIn content existed—but no clear offer
- No consistent cadence for outreach or follow-up
- No clear answer to "where do leads come from *this* month?"

3

System Adjustments

Primary channels selected: Client referrals + Targeted LinkedIn outreach

Simple offer created: "30-Minute Financial Clarity Call"

Cadence established: Weekly outreach, monthly review

Low-performing ideas paused

4

Result

Score: 13 / 15 → Green

Lead generation became calmer—and more reliable.

When Not to Use This Audit

Mid-campaign without baseline data

You need at least 60–90 days of consistent activity to evaluate what's actually working.

To justify more tools or platforms

This audit removes complexity, it doesn't add it. If the instinct is "we need more," pause and simplify first.

After adding multiple new tactics at once

Changing too many variables makes it impossible to know what's helping or hurting.

Run this audit **before** scaling effort, not after results disappoint.



Before You Move On

What This Tool Was Meant to Do

This audit was designed to verify whether your lead generation is reliable—not to create a new strategy from scratch. It exposes whether your current system is intentional or accidental.

A Note on Unclear Results

If your score was yellow or red, that's normal. Most B2B firms operate on momentum and optimism, not documented systems. Discomfort with the results means the audit is working.

Where You Might Go From Here

- **Learn:** Review lead generation principles (StoryBrand, simple offers, cadence)
- **Validate:** Test one primary channel with one clear offer for 60 days
- **Align:** Build internal consensus on channels, offers, and ownership before scaling

About Tingom Group

We help B2B leaders replace hope-based marketing with intentional systems. We don't promise growth—we verify whether growth is set up to happen.

Reliable lead generation doesn't require magic. It requires focus, clarity, and the willingness to stop what isn't working.

Learn more at TingomGroup.com