BMD

The Lead Generation *Machine* kit

Six templates to find your best customer, price a lead, plan its follow-up and count what it pays, in riyals.

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Built by BMD from ideas credited to Dan Kennedy and Dave Dee's 2012 series *The Ultimate Lead Generation Machine*. Not affiliated with or endorsed by them.

The notes on Saudi data protection inside are general information about Saudi rules as published on 15 September 2026, not legal advice. Check your own case with a qualified Saudi lawyer before acting.

How to use this kit

A lead generation machine has four parts: an offer for people who are not ready to buy yet, a way to capture their details, planned follow-up, and a lead bank you count every month.

Fill the six templates in this order. Later templates use what earlier ones find. Templates 1 to 4 take about an afternoon each once you have the numbers. Template 5 takes a working session with sales. Template 6 is a monthly count.

#	Template	The question it answers	Part of the machine
1	Best-customer profile sheet	Who are our best customers, and where did they come from?	Before you start
2	Lead value calculator	What is one lead worth to us, in riyals?	Before you start
3	Lead magnet planner	What will our best customer ask for months before buying?	The offer
4	Two-response ad sheet	Does every ad give a not-ready buyer something to do?	The offer and the capture
5	Follow-up sequence map	What happens to each lead, on which day, and who does it?	The follow-up
6	Lead bank ledger	What came in, what left, and what did it pay this month?	The lead bank

Who fills it in. The marketing manager drafts. Finance supplies gross margin per customer (templates 1 and 2). Account managers supply what started each purchase (template 1). The owner or CEO signs off line 2 of template 2. The sales lead checks templates 1, 2 and 5 before they count as done.

What to have open. Gross margin per customer from finance, a CRM export, last month's lead reports from each ad platform, and a list of every ad running now.

Five words, used the same way throughout.

- **Lead:** a person who gave you a way to reach them and asked for something.
- **Qualified lead:** a lead that meets the definition your sales and marketing teams agreed in writing. You write it down on template 2.
- **Sales event:** the meeting, site visit, demo or showroom appointment where you ask for the sale.
- **Won:** a lead that became a paying customer.
- **Lead bank:** every lead you have neither won nor ruled out.

Template 1 · Best-customer profile sheet

What it is for

The best-customer profile sheet tells you who your best customers are and how each one first reached you. Your best customers are the ones who bring the most gross margin. Templates 3, 4 and 5 are all aimed at them, so this one comes first.

The idea behind it

Kennedy's advice is to start with the customers you already have, even a small number, and study their data before you choose any media or message. What you learn should shape both (Episode 3, 11:07). He also argues that your offer can screen out people who are a poor fit, and even turn them away on purpose, so sales time goes to the right prospects (Episode 1, 07:58).

How to fill it in

1. List customers who first bought from you 12 to 24 months ago, so each one has a full first year. Rank them by gross margin in that first year, using finance's figures. Take the top 10. If you have fewer than 10, use all of them.
2. Use an account code for each one. The sheet works without personal names, so leave them out.
3. Ask each account manager what started the purchase and where the customer gets information. Leave a cell blank rather than guess.
4. Fill parts A, B and C, one row per account. If your CRM never recorded first source or trigger, add those fields for every new lead now. That is BMD's recommendation.
5. Write the summary with your sales lead.

Best-customer profile sheet

Part A · Who they are

Rank	Account code	Sector	Headcount (under 50 / 50 to 250 / over 250)	City	Role of first contact	Role of signer
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

Part B · How they came to us

Rank	First source (referral, exhibition, LinkedIn, search, WhatsApp, partner, other)	First step they took (download, visit request, call, quote request)	Days from first contact to first invoice	What started the purchase (as they described it)	Where they get information (events, associations, platforms)
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					

Part C · What they are worth

Rank	First-year gross margin (SAR)	Total margin to date (SAR, optional)	Bought again or expanded (yes / no, optional)
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

Summary

Most common role of first contact: ____________________________

Most common first source: ____________________________

Most common trigger: ____________________________

Where they get information most often (feeds the channels in template 4): ____________________________

Our best customer, in one sentence: ____

Who we turn away, in one sentence: ____

Agreed by (marketing) _____________ and (sales) _____________ on ____ / ____ / _____

Illustrative example. Not a client, not real data.

A Dammam industrial-safety equipment distributor with 140 employees ranks the accounts that first bought 12 to 24 months ago by first-year gross margin. The top three rows:

Rank	Code	Sector	Headcount	First contact	First source	First step	Days to invoice	First-year margin (SAR)	Trigger (as the customer described it)
1	A-07	Petrochemical contractor	Over 250	HSE manager	Industry exhibition	Asked for a site safety checklist	95	210,000	The site had to be ready before the client's safety audit
2	A-02	Industrial maintenance contractor	50 to 250	HSE supervisor	Referral from a customer	Phone call	60	145,000	A new contract needed a safety plan before work started
3	A-11	Cement plant	Over 250	HSE manager	LinkedIn	Downloaded a protective-equipment checklist	120	120,000	An internal audit found gaps in equipment records

Ranks 4 to 10 follow the same way.

- **Most common role of first contact:** HSE manager or supervisor.
- **Most common first sources:** industry exhibitions and referrals.
- **Most common trigger:** an audit, a new site or a new contract.
- **Our best customer:** contractors whose HSE manager asks for something practical before a site audit.
- **Who we turn away:** one-off buyers who ask only for a price list.

Common mistakes

1. **Ranking by revenue.** A large invoice with a thin margin looks like a best customer and is not one. Rank by gross margin.
2. **Describing the customer you wish you had.** Start from finance's figures, not from a workshop about ideal buyers.
3. **Guessing the first source.** A guessed source points budget at the wrong channel. Ask the account manager, and leave the cell blank if nobody knows.

Done when

- [ ] The top 10 accounts, or all of them if you have fewer, are ranked by first-year gross margin.
- [ ] At least 8 of the 10 have a first source.
- [ ] Sales and marketing have both agreed the best-customer sentence and the turn-away sentence.

Template 2 · Lead value calculator

What it is for

The lead value calculator turns what a customer is worth into two ceilings: the most you will pay for one sale, and the most you will pay for one lead. Then it checks every lead source against both, in riyals. Without these two numbers, any price for a lead is a guess.

The idea behind it

Kennedy says to start with what you will spend to win one customer, then work back to the cost of a lead. Only running campaigns shows you the real costs (Episode 3, 14:57). The same answer goes on to say you should average costs across all your lead sources. The captions carry no speaker labels here. While you are growing, keep the expensive sources as long as the average still gives a cost per sale you accept. A business already at full capacity is the exception (Episode 3, 16:12).

How to fill it in

1. Write your qualified-lead definition and your sales event above Part A. Lines 4 to 6 depend on them.
2. Part A: work down the lines in order. Each calculated line uses the lines above it. Enter percentages as decimals where the "How" column says so.
3. For the three conversion rates, use CRM numbers from the last full quarter. If you have none, write your best estimate and replace it once you have a full sales cycle of data.
4. Part B: one row per lead source. Start with one month. Once you have three months of data, add up the last three months of spend, leads and won deals for each source and use those totals.
5. Judge each source on cost per sale first, then on cost per lead, using the decision rule under the table.

Lead value calculator

Our qualified-lead definition, agreed by sales and marketing:

____

Our sales event is: __________________________

Part A · Your two ceilings

Line	What to enter or calculate	How	Your number
1	Average first-year gross margin per new customer, after delivery cost. Use every account on template 1's list, not only the top 10	From finance	__________ SAR
2	Share of that margin you will spend to win the customer	Agreed with the owner or CFO	_______ %
3	**Allowable cost per sale**	Line 1 × line 2	__________ SAR
4	Leads that become qualified leads	From the CRM	_______ %
5	Qualified leads that reach a sales event	From the CRM	_______ %
6	Sales events that are won	From the CRM	_______ %
7	Lead-to-won rate	Line 4 × line 5 × line 6, as decimals (40% is 0.40)	_______ (decimal)
8	Leads needed for one won deal	1 ÷ line 7	_______ leads
9	**Allowable cost per lead**	Line 3 ÷ line 8	__________ SAR

Part B · Every source against the ceilings (period: __________ to __________. One month to start, then the last three months.)

Source (use the tracking tags from template 4)	Spend (SAR)	Leads	Won (deals from this source's leads, closed in the period)	Cost per lead, SAR (spend ÷ leads)	Under or over line 9	Cost per sale, SAR (spend ÷ won)	Under or over line 3	Keep, fix or stop
Blended (all measured sources)								

Decision rule. Keep: cost per sale is under line 3. Fix: cost per sale is over line 3, but the blended row is under it and you have capacity. Stop: cost per sale is over line 3 and the blended row is over it too. At full capacity, trim the sources with the highest cost per sale first.

Measured or not. A source with spend and 0 won deals is measured. Write its cost per sale as "no sale yet, over line 3" and keep its spend in the blended row. Write "not measured" only when you cannot see the spend or cannot trace won deals to the source, and leave it out of the blended row.

Illustrative example. Not a client, not real data.

A Riyadh B2B IT-services firm. Its sales event is a meeting.

Part A, step by step

Line	Calculation	Result
1	Average first-year gross margin per new customer	60,000 SAR
2	Share the firm will spend to win one	25%
3	60,000 × 25%	**15,000 SAR allowable cost per sale**
4	Leads that become qualified	40%
5	Qualified leads that reach a sales event (here, a meeting)	50%
6	Sales events that are won	25%
7	0.40 × 0.50 × 0.25	0.05 (5%)
8	1 ÷ 0.05	20 leads for one won deal
9	15,000 ÷ 20	**750 SAR allowable cost per lead**

Part B, one month

Source	Spend (SAR)	Leads	Won	Cost per lead (SAR)	vs 750 SAR	Cost per sale (SAR)	vs 15,000 SAR	Decision
LinkedIn lead forms	18,000	60	2	18,000 ÷ 60 = 300	Under	18,000 ÷ 2 = 9,000	Under	Keep
Industry exhibition	36,000	30	2	36,000 ÷ 30 = 1,200	Over	36,000 ÷ 2 = 18,000	Over	Fix: the blended row is under and the firm has capacity
Blended	54,000	90	4	54,000 ÷ 90 = 600	Under	54,000 ÷ 4 = 13,500	Under	
Partner referrals	Not measured							Fix: start tracking spend

What the firm reads from it. Exhibition leads cost 1,200 riyals each, four times the 300 riyals a LinkedIn lead costs, and over the 750-riyal lead ceiling. The exhibition's own cost per sale, 18,000 riyals, is over the 15,000-riyal ceiling too. But the blended cost per sale, 13,500 riyals, is under it. The firm is growing and has capacity, so the exhibition stays and gets fixed. If the firm were at full capacity, the exhibition would be the first source to trim.

Common mistakes

1. **Starting from cost per lead.** A cheap lead that never becomes a sale costs its full price and returns nothing. Set the sale ceiling first.
2. **Putting revenue in line 1.** Revenue instead of gross margin makes both ceilings too high, and you overspend without noticing.
3. **Cutting a source on lead price alone.** Check its cost per sale and the blended row before you stop it.

Done when

- [ ] The qualified-lead definition and the sales event are written above Part A.
- [ ] Both ceilings are written in riyals (lines 3 and 9).
- [ ] Every active source has a cost per lead and a cost per sale, or is marked "not measured".
- [ ] The blended row is calculated and compared with line 3.

Template 3 · Lead magnet planner

What it is for

A lead magnet is free, useful information your best customer would plausibly pay for, given in exchange for a way to reach them. The lead magnet planner designs one magnet around the question your best customer asks months before buying. It also makes you justify every field on the form before anyone fills it in.

The idea behind it

Kennedy describes the magnet as almost always informational: valuable enough that people would buy it, and given away free (Episode 1, 08:32). He suggests that fitting the magnet to its audience may be the most important choice in the whole system (Episode 2, 30:46). A good magnet lets the right people in and keeps the wrong ones out (Episode 4, 07:43). He argues against delivering the magnet online only, because some buyers still do not take in marketing online, even in businesses that run online. He cites other marketers' test results but does not show them (Episode 1, 12:09). He also recounts a US test on Hispanic mailing lists where a piece in two languages beat both single-language versions. He gives no figures, so treat it as his account and a reason to test a bilingual Arabic and English version, not as proof (Episode 4, 19:28).

How to fill it in

1. Copy the best-customer sentence from template 1.
2. Write the question that customer asks before they are ready to talk to sales. Use the words they use.
3. Fill the planner, then the form-fields table. A field with no reason gets deleted.
4. Check the notice and consent boxes with the person who handles data protection, or a qualified Saudi lawyer.

Lead magnet planner

Field	Your answer
Best customer (from template 1)	
The question they ask months before buying	
Working title (plain and descriptive)	
Format (guide, checklist, calculator, recorded walkthrough, a short assessment you run for them, printed guide)	
Language (Arabic, or Arabic and English)	
Who it lets in	
Who it keeps out	
Delivery channel (email, WhatsApp approved template, download link, print)	
The next step it invites	
Owner (role)	
Review date	

Form fields. One row per field. Keep only what the offer needs.

Field	Why we need it	Required or optional	Used for marketing follow-up? (needs its own consent)
Marketing consent (unticked box)	To follow up with offers	Optional	Yes

Notice and consent at the point of collection

- ☐ The form states who we are, why we collect, how long we keep the data, who we may share it with, whether it leaves the Kingdom and how to withdraw (PDPL Article 13, Implementing Regulation Article 4).
- ☐ The guide and marketing follow-up are two separate asks. The marketing box is optional and unticked, and the guide does not depend on it (PDPL Article 7).
- ☐ If you rely on consent, it must be freely given, tied to a clear purpose explained up front, recorded with time and method, and given separately for each purpose (Implementing Regulation Article 11). Downloading a guide and agreeing to sales follow-up are two purposes.
- ☐ Every field has a purpose the offer needs. The PDPL limits collection to the minimum a stated purpose needs (Article 11).

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Illustrative example. Not a client, not real data.

A Jeddah kitchen and home-appliance showroom.

Field	Answer
Best customer	Villa owners choosing built-in appliances before handover
The question	Which built-in appliances should I choose before my new villa is handed over?
Working title	Built-in kitchen appliances for a new villa: a buying guide
Format	Guide, 12 pages
Language	Arabic and English
Who it lets in	Owners with a handover date inside six months
Who it keeps out	People replacing a single appliance
Delivery channel	WhatsApp approved template, to the number the person enters for delivery
Next step	Book a showroom consultation
Owner	Showroom sales lead
Review date	End of next quarter

Above the form: a short notice naming the showroom, the purpose, how long the data is kept, who may receive it, whether it leaves the Kingdom and how to withdraw.

Field	Why we need it	Required or optional	Used for marketing follow-up?
Name	To address the person when the guide is delivered	Optional	No
Mobile	To deliver the guide on WhatsApp	Required	Only with the consent box ticked
City	To route the request to the nearest branch	Required	No
Handover month	To tell whether the owner is inside six months	Required	No
Marketing consent (unticked box)	To call or message about a consultation	Optional	Yes

Consent line under the form, as a separate unticked box: "Optional. I agree that the showroom may contact me by phone, WhatsApp or email about a consultation. I can stop at any time by replying STOP or telling any branch." *Illustrative notice and wording, not legal advice.*

Common mistakes

1. **A brochure dressed up as a guide.** If most of it is about your company, a buyer who is months away has no reason to ask for it.
2. **Counting downloads as leads.** A download with no way to follow up is reach, not a lead.
3. **Asking for every field just in case.** Each field you cannot explain raises the effort of responding, and it is harder to justify under the PDPL's minimum-data rule.

Done when

- [ ] The magnet answers one question your best customer would recognise.
- [ ] Every field has a written purpose, and the marketing consent is separate and optional.
- [ ] The form carries the notice at the point of collection.
- [ ] An Arabic version, or a bilingual version, exists.
- [ ] The next step and its owner are named.

Template 4 · Two-response ad sheet

What it is for

The two-response ad sheet audits every live ad for one thing: how many responses it offers today. Then it rebuilds each ad that leaves the not-ready buyer with nothing to do. The usual fix is two responses. One is for the buyer who is ready now. The other is a low-effort request for the magnet, for the buyer who is months away. Each response gets its own tracking tag and its own owner.

The idea behind it

Kennedy argues that most ads give one reason to respond, and it only suits people ready or nearly ready to buy. Everyone who is one, three or six months away notices the ad and has nothing to do (Episode 1, 02:22). His fix gets two returns from the same budget: sales from people ready now, and a bank of leads who buy later (Episode 1, 06:52). Either response can lead the ad. When the direct ask demands a lot from the buyer, the ad can offer the magnet alone (Episode 1, 19:57). He also explains that every request carries a threshold, and the height of that threshold decides how many people respond. He credits the idea to a US shopping mall developer (Episode 1, 20:30).

The threshold scale used on this sheet

Score	What the response asks of the buyer
1	A few seconds and a short form. No sales contact unless the buyer ticks a consent box
2	A longer form or a short survey
3	A phone call or a live online session
4	A meeting or a site visit with a salesperson
5	A commitment: a deposit, a signed quote or a purchase

How to fill it in

1. List every live ad in Part A.
2. Rebuild in Part B any ad whose only response needs a buyer ready now. Copy Part B for each one.
3. Take the magnet for the not-ready response from template 3.
4. Give each response its own tracking tag. Use each tag as the source name in templates 2 and 6.
5. Fill "Responses this month" at month end.

Two-response ad sheet

Part A · Audit every live ad (month: ___________)

Ad name	Channel	Responses offered (count)	If only one: does it need a buyer ready now? (yes / no)	Decision (keep, rebuild, stop)

Part B · Rebuild one ad (copy this page for each ad you rebuild)

Ad name: ____________________ Channel: ____________________

	Response 1 · Ready now	Response 2 · Not ready yet
What the ad asks them to do		
Threshold (1 to 5)		
What it costs the buyer (time, how much they reveal, sales pressure)		
Magnet offered (from template 3)	Not applicable	
Where the response goes (form, page, WhatsApp)		
Tracking tag (the source name in templates 2 and 6)		
Who receives it (role)		
Response time promised		
Responses this month		

Illustrative example. Not a client, not real data.

A Riyadh office fit-out company's LinkedIn ad.

Before. One reason to respond: "Book a site visit this week." Threshold 4: a meeting, a visit and a salesperson. A facilities manager whose lease ends next year has nothing to do with this ad.

After.

	Response 1 · Ready now	Response 2 · Not ready yet
What the ad asks them to do	Book a site visit	Get the handover checklist for a new office floor
Threshold	4	1
What it costs the buyer	A meeting, an address, sales pressure	A three-field form (name, mobile, expected move-in quarter) plus an optional consent box
Magnet offered	Not applicable	Handover checklist, Arabic and English
Where the response goes	Site-visit form	Checklist form. The file goes out on WhatsApp as an approved template
Tracking tag	FIT-LI-VISIT	FIT-LI-CHECKLIST
Who receives it	Sales coordinator	Marketing coordinator
Response time promised	Within one working hour	File sent automatically. A call within two working days, only if the consent box was ticked
Responses this month	Filled at month end	Filled at month end

Common mistakes

1. **Hiding the second response.** A small link in the footer is not a second response. Give it the same space as the first.
2. **Sending both responses to one inbox with one tag.** You cannot tell which response worked, and nobody owns either.
3. **A second response that is a sales meeting in disguise.** A "free consultation" still scores 4. The not-ready buyer skips it.

Done when

- [ ] Every live ad gives the not-ready buyer a low-threshold response, as a second response or as the only one.
- [ ] Each response has its own tracking tag, a named recipient role and a promised response time.
- [ ] Part A is filled for every ad running this month.

Template 5 · Follow-up sequence map

What it is for

The follow-up sequence map lays out, before launch, every touch a lead receives: the day, the channel, the owner and what the lead is asked to do next. It has three branches. Branch A is for new leads. Branch B is for people who came to a sales event and did not buy. Branch C is a slower maintenance rhythm for everyone still in the lead bank. Every branch has a clear exit.

The idea behind it

Kennedy suggests the process around each lead may be the second most important part of the system. Every lead needs a planned path, and you always know its next step (Episode 2, 31:30). He describes an intense sequence when a lead arrives, then lighter maintenance contact, with the intense sequence rerun from time to time. How long it runs is an economic question: as long as the cost per sale still works (Episode 3, 23:55). Build the map from what you know about each lead, such as its source and how it responded (Episode 1, 45:26). People who attend a sales event and do not buy have many reasons for waiting, so they get a planned sequence of their own (Episode 3, 34:38). And you do not need every step on day one. Start with a few and add more (Episode 4, 11:24).

How to fill it in

1. Start with branch A for your main lead type. Copy the blank steps page for each branch.
2. For each step, write the day, the channel, the owner, the purpose and the one thing you ask the lead to do.
3. Check each step against the channel rules on the next page before you mark consent.
4. Fill the exits table, so every lead has somewhere to go.
5. Ask the sales lead to check the map. Enter results at month end.

Channel rules to write on the map

Channel	Before the first message	In every message or call	When they say stop	Source
Every channel	Consent the person gave to your company itself, on data you collected directly from them	Name your company as the sender	Stop without undue delay. Ask anyone you shared the data with to destroy it	PDPL Articles 5 and 26, Implementing Regulation Articles 12 and 29
Email and print	The recipient's consent and a clear way to stop	Name the sender	Free of charge, honoured at once	PDPL Article 25, Implementing Regulation Article 28
Phone	Explicit consent you can prove. Call from your company's official numbers	Say the company and the reason, then ask to continue. No calls between 10 pm and 9 am	Stop within 24 hours and confirm the stop	CST clauses 5-2-1 to 5-2-4
WhatsApp	The person gave their number and opted in to hear from your business. Start the conversation only with a pre-approved template	Reply freely for 24 hours after the customer's last message. After that, templates only. Poor quality ratings can limit sending	Honour a stop request made anywhere, on or off WhatsApp	WhatsApp Business Messaging Policy, sections 1, 2 and 7
SMS, if used	Explicit consent you can prove. A clause buried in a privacy policy does not count. Send through a CST-licensed provider under a registered sender name ending in -AD, never from a salesperson's mobile	No advertising messages between 10 pm and 9 am	Stop within 24 hours and confirm the stop	CST clauses 4-6-6, 4-3-10 and 4-6-9

WhatsApp's policy does not replace Saudi law. The PDPL consent rules apply on top of it.

The rules do not say clearly whether following up a quote request needs its own marketing consent. So ask for a separate, optional marketing consent at first contact.

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Follow-up sequence map

(copy this page for each branch)

Branch (tick one): ☐ A · New lead ☐ B · Came to a sales event, did not buy ☐ C · Maintenance

Lead type and source: ____________________ Map owner (role): _____________ Start date: ____ / ____ / ______

Step	Day (or rhythm, for branch C)	Channel (email, WhatsApp, phone, print, in person)	Owner (role)	Purpose (see key)	What we ask the lead to do next	Consent checked (yes / no)	Result
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							

Purpose key. Answer: gives them what they asked for or need. Qualify: finds out what they need or what holds the decision. Proof: shows the result for someone like them. Invitation: asks for the sales event or the sale. Check-in: asks whether plans have changed.

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Exits. Where does the lead go next?

If the lead	They go to
Books a sales event	
Is won	
Asks for more time	
Is disqualified	
Does not respond by the last step	
Opts out, on any channel	Every branch stops the same day. Confirm the stop to the person. Ask anyone you shared the data with to destroy it.

Illustrative example. Not a client, not real data.

A Dammam laboratory-equipment distributor. Its sales event is a site assessment. Every step assumes the lead ticked the marketing consent box, except branch A step 1, which only delivers the guide the lead asked for.

Branch A · New lead who requested the equipment-selection guide

Step	Day	Channel	Owner	Purpose	What we ask next
1	0	WhatsApp, approved template	Marketing, automated	Answer	Read the guide they requested
2	0	Phone, within one working hour	Sales coordinator	Qualify	Tell us what the lab needs
3	1	Email	Marketing	Proof	See how a lab like theirs chose its equipment, then reply with the lab type
4	3	Phone	Sales engineer	Invitation	Book a site assessment
5	7	WhatsApp, approved template	Marketing	Answer	Read the answer to a common question, then book
6	10	Print, by courier to the lab's office	Sales engineer	Answer	Keep the printed guide and spec sheets on file. Sent only to leads who asked for a printed copy
7	14	Phone	Sales engineer	Check-in	Book now, or move to branch C

Illustrative example. Not a client, not real data.

Branch B · Had the site assessment, did not buy

Step	Day	Channel	Owner	Purpose	What we ask next
1	1	Email	Account manager	Answer	Read the one-page summary of the proposal
2	5	WhatsApp approved template, or email	Account manager	Proof	See a reference from a similar lab, not shown at the site assessment
3	8	In person, with a printed comparison	Account manager	Answer	Compare two configurations side by side
4	12	Phone	Account manager	Qualify	Tell us which concern holds the decision: price, timing or internal approval
5	20	Email, then phone	Sales manager	Invitation	Consider a phased or smaller first order

Branch C · Maintenance, for 12 months

Step	Day (rhythm)	Channel	Owner	Purpose	What we ask next
1	Monthly	Email	Marketing	Answer	Read one useful note, such as a maintenance tip
2	Quarterly	Phone	Account manager	Check-in	Tell us if plans have changed
3	When the lab announces a new building or expansion	Phone	Account manager	Invitation	Restart branch A
4	Month 12	Email	Sales manager	Invitation	Take a small first order. If there is no reply, close the lead and apply the retention period from template 6

Illustrative example. Not a client, not real data.

Exits on this map

If the lead	They go to
Books a sales event (here, a site assessment)	Sales engineer
Is won	Onboarding
Asks for more time	Branch C
Is disqualified	Close the lead
Does not respond by the last step	From branch A or B: branch C. From branch C: close the lead and apply the retention period
Opts out, on any channel	Every branch stops the same day. Confirm the stop. Ask anyone the data was shared with to destroy it

Common mistakes

1. **One channel for everything.** If the lead agreed to phone and WhatsApp, an email-only map leaves that permission unused.
2. **One sequence for everyone.** A lead who came to a sales event and did not buy knows more than a new lead. Sending them the welcome guide again wastes the sales event.
3. **No exit.** A map with no exit keeps contacting people who said stop. In a statement published on 29 June 2026, SDAIA listed direct marketing without explicit consent among the most prominent violations its committees penalised.

Done when

- [ ] Every lead type has a mapped branch with days, owners and exits.
- [ ] Branch B exists.
- [ ] The opt-out rule is written on the map.
- [ ] The first month's results are entered.

Template 6 · Lead bank ledger

What it is for

The lead bank ledger counts the lead bank every month, like an account: what came in, what left, how old it is and what it paid. It also checks whether the CRM holds the leads the ad platforms reported, and whether each lead has the recorded consent and direct-collection source that marketing follow-up needs.

The idea behind it

Kennedy argues that a steady bank of leads is money you can count on later. Without one, you depend on whoever turns up today. That brings anxiety, pushes you to take clients you should not take, and makes you cut price when a prospect hesitates (Episode 1, 53:00). He says leads that did not buy in the first push can still buy one to three years later, if a slower rhythm keeps them warm. That is his claim, with no figures (Episode 1, 48:32). He treats work on unconverted leads as its own stage, after lead generation and the sales event (Episode 3, 39:58).

How to fill it in

1. Month 1: count every lead in the CRM you have neither won nor ruled out. That is your opening balance (line 4).
2. Write your retention period for leads above Part A. Set it with the person who handles data protection, or a qualified Saudi lawyer. The notice in template 3 has to state it.
3. On the first working day of each month, fill Part A for the month just closed.
4. Fill Part B for the same month. Use the tracking tags from template 4 as source names.
5. Check line 9 against the open leads your CRM shows. Find any gap before the next count.

Saudi data protection: what the ledger has to reflect

- **Marketing use.** PDPL Article 26 allows marketing use of personal data only when it was collected directly from the person and the person agreed. That is why Part B has a source column and a consent column.
- **Withdrawal.** A lead can withdraw consent at any time. The company must stop without undue delay and ask anyone it shared the data with to destroy it (PDPL Article 5, Implementing Regulation Article 12).
- **Retention.** The PDPL does not allow a lead list to be kept forever. Once the purpose ends, destroy the data without delay, including backups and shared copies, or strip out anything that identifies the person (PDPL Article 18, Implementing Regulation Article 8). People have to be told the retention period, or how it is set.
- **Record of processing.** Each lead source should appear in the company's record of processing, with purpose, retention and recipients. The Implementing Regulation requires that record for the life of the processing plus 5 years (Article 33).
- **Data from anyone else.** If you got a person's data from anyone other than that person, tell them within 30 days and name the source (Implementing Regulation Article 4). Bought or scraped lists are a weak base in Saudi Arabia.

This is general information about Saudi rules as published on 15 September 2026, not legal advice. Check your own case with a qualified Saudi lawyer before acting.

Lead bank ledger

Retention period for leads: _______ months. Set with: ___________________

Part A · Monthly count

Line	Item	How	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
	Month name		_____	_____	_____	_____	_____	_____
1	Leads reported by ad platforms	Platform reports						
2	Of those, leads received in the CRM	CRM						
3	CRM match rate (%)	Line 2 ÷ line 1						
4	Opening balance	Month 1: your count of open leads. After that: last month's line 9						
5	New leads in the CRM, all sources	CRM						
6a	Won (count)	CRM						
6b	First-year gross margin of those wins (SAR)	Finance						
7	Disqualified	CRM						
8	Opted out, withdrew consent, or past retention and destroyed	CRM						
9	Closing balance	Line 4 + 5 - 6a - 7 - 8						

Part A · Monthly count, continued

Line	Item	How	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
10	Moved to maintenance (branch C)	CRM						
11	Reactivated from maintenance	CRM						
12a	Open leads at month end, aged 0 to 30 days	CRM						
12b	Open leads at month end, aged 31 to 90 days	CRM						
12c	Open leads at month end, aged 91 to 365 days	CRM						
12d	Open leads at month end, aged over 365 days	CRM						
13a	Won from leads older than 90 days (count)	CRM						
13b	First-year gross margin of those wins (SAR)	Finance						

Part B · Source and consent (month: ___________)

Source (tracking tag)	Collected directly from the person? (yes / no)	New leads this month	With recorded marketing consent	Consent time and method recorded? (yes / no)	Opted out this month (any lead from this source)	Won this month (any lead from this source)
Total						

The last two columns count any lead from the source, not only this month's new leads.

A source marked "no" in the second column gets no marketing follow-up. PDPL Article 26 ties marketing use to data collected directly from the person with consent. Data taken from someone else also triggers a duty to tell each person within 30 days, including the source (Implementing Regulation Article 4). Check any exception with a qualified Saudi lawyer.

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Illustrative example. Not a client, not real data.

A Riyadh B2B software reseller, one month. Its ad platforms are LinkedIn and Meta.

Part A

Line	Item	Calculation	Result
1	Leads reported by ad platforms		92
2	Received in the CRM		77
3	CRM match rate	77 ÷ 92	84%
4	Opening balance		420
5	New leads, all sources	77 from ad platforms + 18 from the website guide form + 18 from the event stand	113
6a	Won		6
6b	First-year gross margin of those wins		270,000 SAR
7	Disqualified		20
8	Opted out, withdrew or destroyed		9
9	Closing balance	420 + 113 - 6 - 20 - 9	498
10	Moved to maintenance		40
11	Reactivated		7
12a	Open, aged 0 to 30 days		106
12b	Open, aged 31 to 90 days		132
12c	Open, aged 91 to 365 days		190
12d	Open, aged over 365 days		70
12a to 12d	Total	106 + 132 + 190 + 70	498
13a	Won from leads older than 90 days		2
13b	First-year gross margin of those wins		110,000 SAR

Illustrative example. Not a client, not real data.

Part B

Source	Collected directly?	New leads	With marketing consent	Time and method recorded?	Opted out (any lead)	Won (any lead)
LinkedIn lead forms	Yes	45	38	Yes	3	2
Meta lead forms	Yes	32	22	Yes	4	1
Website guide form	Yes	18	11	Yes	1	1
Industry event stand	Yes	18	12	Yes	1	2
Total		113	83		9	6

What the reseller reads from it. The platforms reported 92 leads and the CRM received 77, so 15 leads never arrived. That gets fixed before more budget goes to ads. 30 new leads gave no marketing consent, so they get an answer to what they asked for and no promotional sequence. 2 of the 6 wins, with 110,000 riyals of first-year gross margin, came from leads older than 90 days.

Common mistakes

1. **A contact count instead of a ledger.** A CRM total that only grows tells you nothing about age, wins or exits.
2. **Trusting the ad dashboard.** Count leads in the CRM. The platform number is a claim until the two match.
3. **Purging by neglect, or keeping everything forever.** Leads nobody touches go cold. Leads kept after their purpose ends break the retention rule.

Done when

- [ ] A retention period is written above Part A.
- [ ] Line 9 matches the number of open leads your CRM shows at month end. If it does not, find the gap before next month's count.
- [ ] Lines 12a to 12d add up to line 9.
- [ ] The CRM match rate and wins from leads older than 90 days are reported every month.
- [ ] Every source in Part B has an answer in the "collected directly" and consent columns.

Are you ready to build the machine?

Answer yes to questions 1 to 4 before you spend more on ads.

#	Question	Yes	No
1	Can you describe your best customer by role, trigger and first source?	☐	☐
2	Can you name, in riyals, the most you will pay for one sale and for one lead?	☐	☐
3	Does every lead land in one CRM with a named owner within a set time?	☐	☐
4	Do the lead counts from your ad platforms match your CRM?	☐	☐
5	Does your magnet answer a question buyers ask before they are ready to buy?	☐	☐
6	Is there an Arabic version of it, or a bilingual one?	☐	☐
7	Does every live ad give a not-ready buyer something to do, with its own tracking tag?	☐	☐
8	Is there a separate branch for people who came to a sales event and did not buy?	☐	☐
9	Do you count the lead bank every month, including wins from leads older than 90 days?	☐	☐

Where to go deeper

- **What a qualified lead means, written down once for sales and marketing:** The Marketing Department: A System, Not a Headcount, bmds.sa/marketing-department/
- **Customer acquisition cost, lifetime value and step conversion rates:** Marketing Strategy in Saudi Arabia: The Four Choices, bmds.sa/marketing-strategy-saudi-arabia/
- **Choosing a magnet from what Saudi buyers search for:** What Saudi Arabia Actually Searches For in Marketing, bmds.sa/what-saudi-arabia-searches-for-marketing/
- **One action per piece of content:** Content Strategy: 97% Have One, 12% Hit Their Goals, bmds.sa/content-strategy/
- **Who runs the machine:** Marketing Team Structure in Saudi Arabia: Who to Hire First, bmds.sa/how-to-structure-a-marketing-team-saudi-arabia/
- **Why buyers rank vendors before they fill in a form:** Founder Personal Brand: Optional If Buyers Can Test First, bmds.sa/founder-personal-brand/

Take the assessment

The Scale Readiness Assessment scores your company across the five components of a working marketing department and shows you the constraint to fix first. It takes 5 minutes. You get a number out of 100 and the band it puts you in.

Take the 5-minute assessment → bmds.sa/assessment/

or start with a baseline conversation: r@bmds.sa

About BMD

Most companies don't have a marketing problem. They have a marketing department that was never built. BMD is a boutique consultancy that installs structured, measurable marketing departments inside mid-market companies across the GCC. We don't run your campaigns, and we don't hand you a strategy deck and leave. We build the operating system: the structure, the measurement, and the ownership that turn marketing into a function leadership can rely on. The method is the BUILD framework, published and practiced: a book, an online program, a community of Gulf founders and marketers applying it, and diagnostics that replace assumptions with measurement. Delivered in Arabic and English, founder-led.

Credits

Ideas credited to Dan Kennedy and Dave Dee, *The Ultimate Lead Generation Machine*, Magnetic Marketing YouTube channel: Episode 1 (uploaded 17 October 2012), Episode 2 (18 October 2012), Episode 3 (19 October 2012), Episode 4 (19 October 2012). The captions carry no speaker labels, so attribution to Kennedy or Dee is inferred from context. The templates are BMD's own structures. BMD is not affiliated with or endorsed by the authors. Saudi rules cited from the Personal Data Protection Law and its Implementing Regulation (SDAIA), the CST Regulations for Curbing SPAM Messages and Calls, and the WhatsApp Business Messaging Policy, as published on 15 September 2026.

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