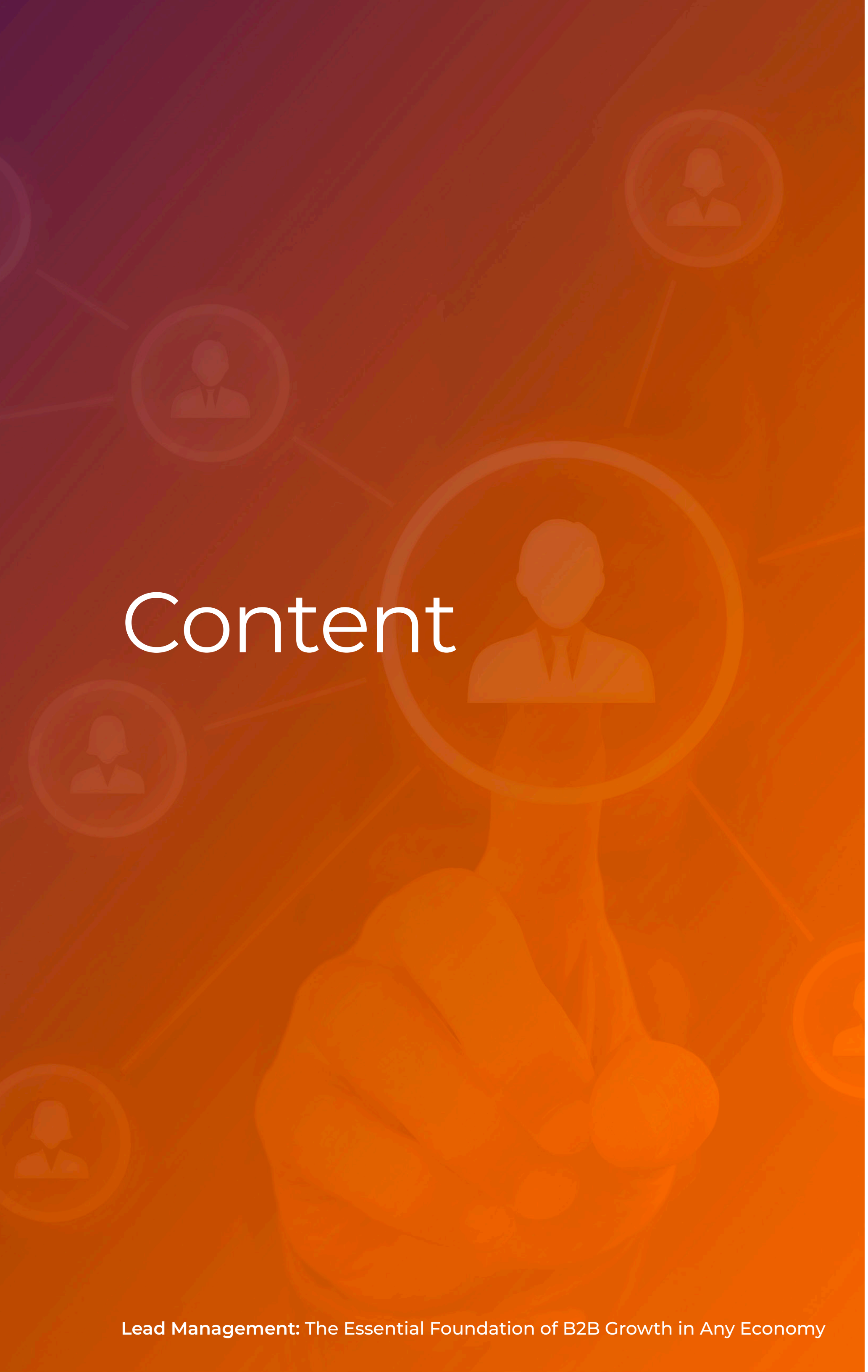
Lead Management

The Essential Foundation of B2B Growth in Any Economy

A Guide for Revenue Teams to Extract Value from Every Lead

LeanData



Content

Introduction

As the global economy responds to the Coronavirus pandemic, all businesses are navigating a new, uncertain economic environment. By some estimates, GDP growth rates may fall as much as 50% as many businesses are forced to close. Those able to continue to work digitally struggle to create pipeline. TOPO research found a 150% increase in buyers not booking meetings due to COVID-19.

One thing is certain: The foundation of B2B growth now, and in any economy, is strategic lead management. To grow during these times, revenue teams must make the most of every potential customer. Now is the time to maximize what's possible from leads - an increasingly scarce and valuable resource.

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[1] Expected U.S. Macroeconomic Performance during the Pandemic Adjustment Period
https://www.stlouisfed.org/on-the-economy/2020/march/bullard-expected-us-macroeconomic-performance-pandemic-adjustment-period

[2] **https://blog.topohq.com/150-increase-in-buyers-not-booking-meetings-covid-19-survey-reveals/**

What RevOps Teams Are Doing

We asked what strategies marketing and sales operations teams were undertaking in response to the economic downturn. Some of our favorite strategies:

"It's a great time to go through your database and clean it up... Identifying contacts that have aged, bounced, or are missing key data. Fill in the key data with data enrichment. Review your properties and clean up unused properties, standardize and update formatting so you can help your marketing teams segment their data more effectively. Review and update your process and system documentation."

Adam Sharrow, Founder and Principal Adviser, Process Pro Consulting

"This is the time to get one the most important and basic elements- database, cleaned-up. This will help you not only in the current situation but once we all are up and running as well. This shall help in better reach, targeting, segmentation, coordination between marketing and other teams and lot more."

Mark Regal, IBCConnect

"Creating more single source of truth reporting for all members of the account teams in Salesforce, then backing that up with regular account team syncs."

Chad Dyar, Head of Field Ops and Enablement, Hearsay Systems

"Focus on growth markets... use behavioral data to hone in on accounts that are in-market... lean into account insights, people, and personalized messaging."

Chris Ortolano, Founder, Outbound Edge

Lead Management Defined:

Here at LeanData, we think of lead management as an end-to-end process across Marketing, Sales, and Customer Success (all revenue-producing teams.)

Likewise, Gartner defines lead management as facilitating a business's customer acquisition - inbound and outbound, online and offline.[3]

"CRM lead management integrates business process and technology to close the loop between marketing and direct or indirect sales channels, and to drive higher-value opportunities..."

This discipline is about uniting teams to foster growth, working together to ensure sales reps receive the right leads they need to work on, so they can close more deals and drive more revenue, faster.

"Leads are the lifeblood of every organization – yet if they're not effectively managed once generated, their ability to power the revenue engine quickly diminishes."

Evan Liang, CEO of LeanData

[3] https://www.gartner.com/reviews/market/crm-lead-management

Lead Management Is a Business Priority

Go-to-market leaders at high-growth companies rated lead management technology one of the most impactful tools for both sales and marketing teams.[4]

But, less than half of firms have adopted lead-to-account matching and lead routing technology to-date. TOPO predicts the market for this technology to double in 2020.

[4] TOPO MARKETING TECHNOLOGY REPORT 2019, TOPO SALES TECHNOLOGY REPORT 2019

What's behind this recent and massive uptick in the adoption of lead management?
The biggest factors:

Leads are gold

1 Leads are not just records in a CRM tool. The highest-performing companies think of them instead as revenue assets, and a database as the foundation for all future growth. How you manage, invest in, and maintain this asset dictates your success. Every firm should establish a clear process by which teams match, route, assign, prioritize, and nurture leads, like a supply chain for revenue.

Unfortunately, many firms struggle to manage their data today. In a recent study, data was ranked as the revenue engine's least-aligned function.[5]

"The inability of B2B organizations to centrally manage their data has prevented them from delivering a seamless customer experience across the revenue chain."

Craig Rosenberg, Chief Analyst at TOPO

CRM sits at the core of customer experience

2 Great lead management removes the barriers to a great customer experience (CX), an increasingly important business priority. In our latest State of RevOps research[6], 95% of B2B organizations agree CX is key to unlocking growth, and that a seamless, consistent customer experience (pre and post sale) is a key differentiator and revenue driver.

"When thinking about an economic downturn it's important that MOPs think about what it means to practice human marketing. Putting our customers and potential customer's needs first and meeting them where they are shouldn't be an exception, but rather the golden standard...

Those who can adapt to the change the quickest will do their company, clients, and future clients a great service. Change is inevitable, our ability to adapt will make all the difference."

Stephen Stouffer, Sr. Manager, Marketing Operations at FireMon

[5] State of Revenue Operations 2019 **http://info.leandata.com/StateofRevOpsReport2019.html**

[6] State of Revenue Operations 2019 **http://info.leandata.com/StateofRevOpsReport2019.html**

Go-to-market complexity

3 As B2B teams navigate increasingly complex GTM motions, lead management becomes the linchpin for all revenue operations. Teams are juggling a large number of tactical elements (e.g. ABM, digital content, direct, social, outbound and inbound) in addition to a complex buyer environment (e.g. buying committees, partners and channel complexity.)

What's more, a go-to-market plan evolves as the business evolves. Revenue teams changing and morphing their GTM strategy to adapt to market conditions need a data infrastructure that is both agile and able to scale with them.

Managing leads through this complexity involves breaking down silos between teams and unifying multiple disconnected data systems. Failing to do so often translates to a poor buyer experience, and threatens growth potential.

Economic uncertainty

4 So much has suddenly changed due to the global pandemic. Face-to-face trade shows? Cut. Field events? Cut. Budgets? Cut.

The spread of uncertainty has triggered cost-cutting reflexes in organizations looking to dampen the impact on their businesses. According to a PwC survey[7], a vast majority of corporate leaders are considering some sort of financial action as a result of the pandemic. Growth in this pullback dynamic is about minimizing waste, maximizing efficiency, and taking advantage of every lead you can create.

In any economy, up or down, it's paramount that you treat all leads as a valuable asset.

This guide will clarify the elements of lead management that matter, including lead routing, lead-to-account matching, engagement, and attribution. We'll share examples of customers making the most of their revenue assets through process and technology. We'll also include the insights of revenue operations professionals who are planning for the road ahead.

We hope you use this resource as your guide for the journey ahead.

[7] https://www.pwc.com/us/covid-19-survey?WT.mc_id=CT1-PL52-DM1-TR1-LS4-ND30-PRG6-CN_CFOPulseSurvey-&eq=CT1-PL52-DM1-CN_CFOPulseSurvey

“Holistic B2B lead management is about cleansing and unifying data, routing appropriately, analyzing its effectiveness, and having the insight to know what’s happening within your accounts and campaigns.”

Charm Bianchini,
Vice President of Growth Marketing
LeanData

Elements of Good Lead Management

If B2B lead management was a recipe, it may look something like this:

1 part lead-to-account matching
1 part lead routing
1 part account engagement analytics
1 part attribution

Combine all ingredients with a robust CRM tool (no spreadsheets, please) and add automation to taste. Serve to your hungry sales team, and be sure to demonstrate revenue results to the board.

Elements:

1. Unite and cleanse data
    a. Lead-to-account matching
    b. Lead routing
2. Account engagement analytics
3. Attribution and measurement

Unite and Cleanse Data

Lead-to-Account Matching

In B2B, most organizations are now leveraging Account-Based Marketing (ABM), focusing efforts on those accounts most likely to drive revenue. In a recent study, only 6% of respondents said they are not doing ABM yet in any form.[8]

According to TOPO, Lead-to-Account (L2A) Matching is "absolutely required for high-growth organizations running account-based programs."

Why? Because this process reveals unseen relationships between leads, contacts, and accounts, helping your sales team to create opportunities from hidden connections in your data. When Leads and Campaign Members are disconnected from accounts, the sales team is deprived of context, creating additional time and work for them to research and triage.

Unfortunately, some of the most widely-used CRM tools lack a connection between leads and accounts, creating headaches for administrators overseeing the database. With the growth of account-based strategies, it's now become a strategic hurdle for business with a very real bottom-line cost.

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[8] https://www.demandgenreport.com/resources/reports/2019-abm-benchmark-survey-report

What great data cleansing and matching looks like:

- Lead records matched to corresponding accounts.
- A 360-degree view of what is happening at the account level (context).
- Sales reps are always aware of any new leads or contacts entering the CRM associated with their accounts.
- Multiple account matches, complex parent-child account hierarchies and duplicate accounts are handled the way your business prefers.
- Augment leads with matched account information such as industry or revenue.
- Leverage account fields to segment and personalize marketing campaigns.

"We finally can see the connection of leads to their accounts in SFDC. That improved visibility has helped in identifying new sales targets, avoiding mistakes with existing (ones), as well as seeing where is marketing connecting with our lead database."

Brennan McAdams, Director of Business Applications, Pure Storage

Technology consideration for lead-to-account matching

L2A Matching was named one of the most impactful technologies in both the sales technology stack and marketing technology stack in a recent TOPO analysis. This technology should:

- Match any CRM object; leads, contacts, accounts, campaigns, or opportunities.
- De-duplicate: Every net-new lead should be checked against leads and contacts in the CRM system, eliminating duplicate records as leads flow in.
- Match on multiple fields beyond email domains to ensure the highest-fidelity account match.
- Update matching results in real time.
- Seek a solution that is native to your CRM for safety and security. Your vendor should not export data elsewhere to do its matching and routing.
- Look for the ability to customize tiebreakers. What happens when a lead matches into multiple accounts? Fuzzy matching often produces several potential corresponding accounts. You need control over which account is the best match.

Whether you're navigating parent-child hierarchies or controlling duplicate accounts, tiebreaking criteria should include geography, opportunity stage/type, company size, revenue, and account type, or any other custom field.

LeanData's proprietary fuzzy matching algorithm is best-in-class, with accuracy rates of greater than 95% where a match exists.

Customer example:

"Since we began relying on LeanData to do matching, we have seen an incorrect match three times," said the manager of marketing operations of an enterprise-sized customer. "Only Three. That's out of more than 750,000 records. That's so much better than we could have done manually."

Lead Routing

There's one question that Craig Rosenberg, the Chief Analyst at TOPO, gets asked over and over. What can our business do to quickly improve our conversion rates? His answer: **Look at your lead routing.**

> "I can't tell you how many times customers found that literally hundreds of leads were never touched or sent to the wrong places, Rosenberg said. "It's not sexy, but there's a huge lift just from solving your lead routing process."

What great lead routing looks like

Lead routing ensures leads are routed to the right person, quickly. TOPO defines lead routing as "the rules and functionality for routing to the assigned sales rep or other internal contacts."[10]

- Leads are routed to the correct owner according to rules (e.g. round robin or territory-based distribution).
- Net-new leads are routed automatically for fast follow up by an Sales Development rep (SDR).
- Leads from accounts with active opportunities are directed to the Account Executive (AE) working those deals.
- Leads from existing customers are shipped to appropriate Customer Success team members.
- All leads and contacts within a target account are routed to the same sales rep (the account owner).
- Service Level Agreements (SLA) are put in place to ensure response times and process adherence (see below for examples).
- Real-time and FAST assignment, so that valuable leads are never lost, ignored, or delayed. Lead routing should help to improve your response time, shorten the sales cycle, and provide a good customer experience.

[9] https://learn.leandata.com/routing-rules-leandatas-sales-and-marketing-blog/the-view-from-topo-lead-routing-matters

[10] TOPO Marketing Technology Report 2019

Styles of Lead Routing

Round-robin	Territory-based	Account-based	Demand prioritization
A simple method to distribute leads equally among a team of sales reps. Robust round-robin systems must have the flexibility to deal with complex scenarios e.g. weighted assignment to give new reps time to ramp up, temporarily skipping reps who are on vacation and re-assignment of leads for reps who leave the company.	Distributing leads based on sales territories e.g. geography, industry, headcount or revenue. Demand is ideally balanced across territories.	Assigning leads based on named accounts - these should always precede a territory-based rule. Leads (or contacts) that match to the corresponding account are routed immediately to the account owner.	Used in scenarios with high volumes of lead generation, this model prioritizes the highest-value, most-engaged prospects with the highest probability for conversions based on scoring.

Sample time-dependent SLAs:

- **Inbound leads**: Any marketing qualified inbound lead has to be emailed/called within 1 hour, or is assigned round robin to another SDR
- **Sales opportunity:** No sales rep can have an open opportunity that is more than 4 months old
- **Renewal:** The CSM on an account will reach out to the primary contact at least 45 days before deal renewal

Hybrid models:

Some organizations deploy a hybrid model of lead routing, utilizing both territory-based assignments as well as named account assignments. The style you choose to follow will depend on your resourcing (people and technology) as well as business priorities.

E.g. when a software company recently laid off personnel as part of an economic downturn, their lead routing switched to a territory-based model to match their reduced staffing.

Impact of lead routing:

Lead routing helps organizations ensure leads are distributed properly. This has a direct impact on key business performance metrics: efficiency, speed and productivity.

Whatever go-to-market strategy you're using, your channels, and your sales cycle will dictate what style of lead distribution and routing is appropriate for you.

- **Efficiency:** Currently, less than 34% of firms say Sales always follows up on marketing-generated leads. Those who do can see an improvement of 20 to 25 percent in their conversion rates simply by fixing their routing process.[11] This not only improves sales productivity, it gives prospects a great buying experience. ON24's sales team improved their efficiency by 10x and reduced the sales cycle by 3 weeks with lead routing from LeanData.
- **Speed:** Companies that respond to inquiries within an hour are 7x more likely to qualify the lead than those that respond 2+ hours later, and 60x more likely than those that respond 24+ hours later. Despite this, the average response time for sales leads is 42 hours.[12]

"Speed isn't everything. "It's not only speed that counts. It's speed and context. You must understand the customer's needs so the message can be personalized."

Craig Rosenberg, Chief Analyst at TOPO

According to a study by Insidesales.com, "The odds of the lead entering the sales process, or becoming qualified, are 21 times greater when contacted within five minutes versus 30 minutes after the lead was submitted".

- **Productivity:** On average one out of every four leads is routed to the incorrect account owner. This creates additional work for sales reps who must spend part of their day reassigning leads to the correct person.

"Or they may do nothing at all – letting those leads wither and die. At best, this is a productivity issue for the sales reps as they do busywork rather than focus on selling. At worst, money is being left on the table as leads fall through the cracks." [13]

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[11] https://learn.leandata.com/routing-rules-leandatas-sales-and-marketing-blog/the-view-from-topo-lead-routing-matters
[12] https://www.socialmediatoday.com/news/how-email-responsiveness-builds-trust-infographic/572022/
[13] LeanData State of Lead Management Report 2017

Technology

What role does technology play in ensuring the transfer of demand between Sales / Marketing / Customer Success is frictionless? Here are four key considerations of lead routing technology:

1. **Automation** is a critical component to scaling lead management, especially at high-growth firms. TOPO recommends that at least 70 percent of a rep's day should be spent on customer-facing engagement. But that cannot happen if sales teams are focused on manually researching and assigning leads. Those who can automate lead management see a 10% (or greater) increase in revenue in 6-9 months.[14]

2. **Third-party tool.** For most organizations, a CRM is not enough on its own to enable lead management, leading to third-party lead routing tools added to a CRM instance. This type of technology should aggregate lead data from multiple data sources and repositories to a singular, horizontal customer database, enabling a seamless workflow across the customer lifecycle as well as internally.

3. **Flexibility.** A recent study found nearly 50% of organizations make routing changes every quarter. That's logical considering the start of a new quarter is the customary time to pause, evaluate and consider adjustments such as modifying territories. As your go-to-market strategy adjusts, your lead routing tool must support this flexibility, allowing sales processes to seamlessly evolve with business needs.

4. **Auditing.** Teams need visibility to diagnose issues and fix problems. Ensure it's clear exactly how leads are flowing through the system - both who is touching them in the organization and how they are affected by other tools.

LeanData was named the leading vendor of lead routing technologies by TOPO.[15] Our best-in-class Round Robin capabilities contain several high demand features:

- Multiple round robin pools with different members and settings (e.g. a separate pool for website leads and another for event leads).
- Different access levels to pool information and settings for pool members and managers.
- Schedules such as working hours, vacations, and regional holidays.
- Custom weighting to route more leads to one or more pool members (based on skill level or availability).
- Capping limits to balance rep workloads to ensure no one is overworked with too many leads routed to them in a certain period of time.

[14] Strategic IC, 2017 (Source: **https://www.hubspot.com/marketing-statistics**)
[15] TOPO Marketing Technology Report 2019

Customer examples

Kaltura: Kaltura implemented LeanData for Lead-to-Account Matching and Routing to ensure leads were delivered to the right reps, territories, and account owners as quickly as possible and that no leads were left behind or lost.

"LeanData's lead matching and routing is a key component in our lead lifecycle, which is the baseline for our entire sales operation."

Lisa Bennett, VP Marketing, Kaltura

Rapid time-to-engagement with <1-minute lead routing: Kaltura has ensured that the right leads get into the right hands much faster and with more accuracy than before. LeanData automatically sends alerts to the appropriate team member and quickly moves processed leads into the funnel.

"Our lead routing is now basically a one-minute process. That's it. We don't lose sales momentum, we don't lose leads, MQLs, and opportunities, and we don't squander employee resources on manual lead management tasks" - Roni Menashe, Marketing Operations Manager, Kaltura

Matching and routing, simplified: With its multiple business units, geographies and account types, Kaltura's sales structure is multi-faceted and complex. LeanData supports this complexity with flexible rules-based routing that can quickly adapt to changes in field personnel, territories, accounts and company strategy.

"We don't just have a lead matching and routing process, we have more of a language in that we have several highly adaptable lead flows that work transparently behind the scenes," explained Roni Menashe. "At Kaltura, we have a very sophisticated routing tree for our leads, and LeanData makes it simple to keep lead management aligned with our sales structure and thus support our revenue growth strategy."

Improved ROI: Kaltura's use of LeanData is helping to power both its marketing and sales ROI. The ROI from marketing campaigns is protected and extended by lead routing routines that "leave no lead behind," while ROI from sales activities is increased through reps having faster access to fresher MQLs. "While many of our leads come from visitors to our website, we spend money on lead generating activities such as trade shows, offline events, and webinars, and expect a return on that spend as opposed to having leads become stale or lost," said Roni Menashe. "With LeanData, our lead flow is smoother and faster. Add in the time and resource savings from the elimination of manual lead management processes, and you have a substantial return-on-investment."

Namely: All-in-one HR solution Namely faced complex routing challenges as it began rapidly growing. As more leads flooded into the system, the response time of the sales team was slowing as reps waded through the database looking for workable leads.

"We didn't have the tool to actually start routing the leads to the appropriate people, whether it be clients who were visiting the website, consultants, people who wanted to partner or just new prospects," recalled Chris Flores, the manager of inside sales. "We had no visualization of where they were coming from, who was going to own that account and where they were being routed."

Now with LeanData, promising leads are immediately directed to the correct sales reps, who then can make an informed decision about the action needed.

Account Engagement Analytics

Despite the rising adoption of Account-Based Marketing, revenue teams often don't know how their named accounts are interacting with marketing campaigns or sales activity. Nearly 40% of firms say Sales, Marketing, and Customer Success functions are not aligned to maximize revenue-growth potential.[16]

To work named accounts effectively, B2B revenue teams need holistic account data. This includes matching all objects in a CRM (tasks, events, campaigns, etc) to corresponding accounts, so that marketing and sales efforts are tied together and these two teams can work together from the same set of insights.

Benefits of account engagement analytics:

Account engagement analytics are a key part of B2B lead management. They drive Marketing and Sales alignment through mutual understanding and access to the same engagement data on named accounts. For example:

- Which prospects/customers are engaged at each account?
- Which accounts should Sales prioritize?
- For which accounts can Marketing lend more support through additional campaigns?
- Which campaigns should Sales follow up on?

With shared insights, these two teams can align and coordinate their activities to drive more pipeline, more conversions, and more revenue. This holistic view also gives revenue teams a chance to adjust strategies based on which campaigns, content, and channels are creating high (or low) engagement levels.

[16] The State of Revenue Operations 2019

Technology for account engagement:

When seeking technology to enable these insights, consider the following capabilities:

- Engagement analytics technology should help you to visualize account engagement and campaign engagement from all related leads and contacts within the account.
- Insights should be presented in a simple and accurate manner making it clear how accounts are engaging.
- Tools should live natively within the context of revenue teams' daily activities e.g. within a CRM, to ensure team alignment.
- Engagement reports should give insights that Sales and Marketing can act on e.g. a list of actively engaged leads from target accounts, or accounts that need to be targeted. This allows Marketing to identify unengaged target accounts and quickly adjust engagement activities, supporting sales with increased pipeline. Look for reports such as:
  - Most / least marketing engaged accounts this month
  - Marketing vs. sales engagement over time
  - Sales activated accounts without recent marketing engagement
- Insights should be straightforward and easily understood. Lead scoring and intent data are not sufficient replacements for holistic account engagement data. While they have been used to help sales prioritize leads, some highly scored leads are not interested in a sales conversation, damaging the credibility of marketing metrics.

Knowing how each person in an account is engaging eliminates ambiguity and disagreement around scoring metrics, allowing Sales and Marketing to align their messaging for leads and accounts.

Industry quotes

"In order to deliver an end-to-end customer experience, B2B organizations need a comprehensive view of activity and **engagement**. Unfortunately, many companies have only partial or siloed views into this engagement."

Eric Wittlake, Senior Analyst, TOPO Research

"Because more than 75 percent of B2B purchases are made by groups of people working together – not individuals – the best indicator of a true buying cycle is the **engagement** of multiple buying committee members."

Kerry Cunningham, Vice President, Principal Analyst, SiriusDecisions.

Attribution and Measurement

Revenue leaders need to understand what's working and what's not. Without actionable insights, teams risk investing in channels that yield poor pipeline and revenue.

Lead Management Measurement

First, it's important to measure your internal lead management performance.

If you're spending $1M to sponsor your industry's largest trade show, and asking sales reps to follow up on those leads, it's critical to know how well your lead follow-up is happening. Visibility into your effectiveness matters.

Helpful ways to measure lead management performance include:

- Tracking adherence to SLAs
  - E.g. # of missed leads, time-to-follow-up, or missed SLAs by rep
  - Benefit: Support sales performance conversations
- Funnel Metrics Velocity (FMV) insight
  - E.g. Time spent in each stage/status by account segment, industry, or rep
  - Benefit: Forecast revenue & time to close based on company size, industry, etc. Identify the stages with the longest duration and adjust processes accordingly
- Understanding overall trends
  - E.g. How many leads have been created, followed-up on, and converted to customers in a given time frame

Attribution

Lead management strategy must also include attribution to help make data-driven decisions about where to continue investing marketing budget dollars for the best return. This is about determining what's working, and where to reallocate funds.

Marketing attribution is a process for accurately giving credit to campaigns and "touches" that customers have as they go through the buyers' journey.

Unfortunately, 58 percent of B2B organizations rate their current ability to measure and analyze marketing performance[17] as "needs improvement" or worse. And, like everything else in lead management, it all comes down to data quality.

In a Cloudingo study, 58 percent of respondents said that their Salesforce data was not useful or reliable.[18] Since effective marketing attribution depends on clean and accurate data, it's not hard to see why low-quality data is a significant hurdle to many companies.

Impact of attribution

- Understand key points along the buyer's journey
- Monitor the downstream impact of marketing channels and campaigns
- Prioritize campaigns that have higher revenue impact, by doubling down on those that influenced more opportunities
- Establish campaign level ROI

Technology

What measurement technology you choose should enable revenue operations teams to track performance against plan at each stage of the customer lifecycle:

- Engagement to Marketing Qualified Accounts
- Conversion to Opportunity
- Pipeline
- Closed Won

52 percent of B2B marketers said they currently report on marketing results manually via Excel.[19] When considering attribution technology, seek a solution that:

- Associates leads in the CRM or marketing automation tool with contacts, accounts and opportunities, so that pipeline and revenue can be accurately attributed back to campaigns. (This is where L2A Matching enables reporting.)
- Enables multiple custom attribution models
- Distributes leads from high-yield campaigns intelligently to your best reps
- Identifies touches from both Marketing and Sales
- Lives natively within your CRM environment

[17] https://www.demandgenreport.com/resources/reports/2018-marketing-measurement-attribution-benchmark-survey-report

[18] https://cloudingo.com/wp-content/uploads/Salesforce-Users-Benchmark-Report-2017.pdf

Attribution Models:

Model	First-touch	Last-touch	Multi-touch
Description	100 percent of credit is given to the first campaign touchpoint	100 percent of credit is given to the last campaign touchpoint	Credit is weighted and assigned based on the mix of campaign touchpoints
Use case	Which campaigns are generating the most value	Which campaigns are most effective at creating opportunities	Multifaceted view of over all campaign performance

At LeanData, we use a multi-touch model, which gives us the ability to see which campaigns and content are helping create pipeline. We're able to identify what is working and what isn't, empowering us to make better marketing decisions. Even more, a multi-touch accelerated model tracks touches that occur during an open opportunity until it closes. This helps identify which programs are working to help close the deal.

Customer example

Smarsh: This archiving and compliance solution provider focuses on large accounts in the enterprise space where people will have interacted with marketing programs multiple times over the years before an opportunity is even created.

"After that, some of these opportunities have long sales cycles. It's really important for us to see the whole range of marketing activities associated with a particular opportunity and be able to understand what is driving behavior."

Alexander DeMoulin, Growth Marketing Analyst, Smarsh

The reporting that DeMoulin creates using Smarsh attribution data reveals which "touches" are most impactful. "We can now go to campaign managers and stakeholders in other departments, like finance, who are interested in marketing's yield versus spend, and be very transparent," he said. Organizations like Smarsh that have embraced attribution can report the bottom-line impact of marketing's spend.

[19] DemandGen's 2018 Marketing Measurement & Attribution Benchmark Survey Report
https://www.demandgenreport.com/resources/reports/2018-marketing-measurement-attribution-benchmark-survey-report

Measurement and RevOps

The business world is fast-adopting Revenue Operations - a unified approach to go-to-market strategies that enables Sales, Marketing, and Customer Success teams to operate in one cohesive way. Within this shift to RevOps, measurement evolves from each function maintaining its own metrics, to a consolidated view of the revenue process.

This was a key area of misalignment in a recent study, as firms reported the data across their revenue chain to be misaligned, siloed, and ineffective in driving growth.[20] On a scale of 1-10, firms rated their measurement capabilities a 6.07.

A Revenue Operations structure ensures you have a common understanding and agreement across the entire company for your go-to-market strategy, execution and measurement to better drive growth."

Jake Randall, VP Business Operations (former) at Okta

[20] The State of Revenue Operations 2019

Conclusion

The modern B2B funnel has more Sales and Marketing interactions, creating friction in the process when leads don't arrive at the right person.

Lead management is part of an aligned experience to deliver value across the revenue process. It's the #1 way to extract the full value of every lead, improve ROI from your marketing budget and sales budget, and deliver the customer experience buyers seek.

We hope the guidance here will help you to refine your lead management strategy and process. When it comes to technology, LeanData is uniquely qualified to help you drive consistent growth as a leading vendor in Lead-to-Account Matching & Routing.[21]

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[21] TOPO SALES TECHNOLOGY REPORT 2019 findings

About LeanData

LeanData provides the market's first Revenue Operations platform for accelerating revenue and growth in B2B. Standing at the center of Salesforce CRM, LeanData's Lead-to-Account Matching, Routing, Engagement and Marketing Attribution solutions orchestrate and automate the go-to-market process to help revenue teams close more deals and drive more revenue, faster.

For questions or to see LeanData in action, schedule a demo today:
https://www.leandata.com/demo-request/