# Avoiding lost revenue from your lead generation programs.

https://www.leadassign.com

**“Without automating and having visibility to our lead management processes we were flying blind.” -** HP inc.

## What is Lead Management Automation?

**Lead Management Automation is the process of automating the qualification, distribution, and tracking of every marketing-based lead. It involves using lead generating programs and providing updates to your current infrastructure systems, such as HubSpot or Salesforce.**

Whether you use HubSpot for nurturing your leads or Salesforce for tracking conversions, you typically never have the complete picture of what actually happens from lead analysis to conversion.

If you use a channel or retail sales model, sales teams can use many different tools, but rarely use the same system so you understanding a clear picture of lead pursuit can be difficult and timely. At the same time, if your sales team uses a CRM, rarely do you have greater than 50% compliance of its use. Instead, marketing program experts are typically forced to manually distribute leads via spreadsheets and email.

**A comprehensive checklist is needed.**

Ensuring an optimized marketing lead generation budget is no small task. It’s a never-ending list of tasks, such as tracking responses, analyzing lead quality, and understanding lead pursuit stages for your sales counterparts and sales partners.

Without a comprehensive view of the entire program from lead generation source to conversion, you will spend your time reviewing instead of focusing on new lead streams for cashflow optimization.

Lead Management Automation can help you understand which marketing programs are working and which require tuning or elimination. This reduces the need for requesting updates about lead quality and lead pursuit from your sales teams.

The steps required to kick off the workflow exercise are Capture, Route, Track.

**Capture**

Identify all lead sources

**Route**

Determine workflows based on qualification.

**Track**

Determine feedback request cadence

Doing the appropriate homework will ensure your lead automation plan offloads any of your current manual steps.

# Your Lead Automation Checklist.

## Initiating. Understand your lead flows.

Automating existing lead flows starts with ensuring all lead sources are identified. Lead Assign parses the lead contents, meta data, and any enriched content that has been appended to the lead. The A.I. engine creates a unique score based on the custom profiles of your sales network.

- ☐ Website
- ☐ Marketing Campaigns
- ☐ Direct API (Hubspot etc.)
- ☐ Vantage IQ+
- ☐ Call Center, Outsourced Lead Get
- ☐ Telemarketing
- ☐ Tradeshow

After the lead sources are identified, the next step is to outline the typical lead payload by source.  When doing so, there will be required and additional information. Think of a typical request for information as an example. In this case, it will include name, email address, and additional contact information that is required to process the request, but there will also usually be additional details in the payload.

Mandatory:

- ☐ Name
- ☐ Company
- ☐ Email
- ☐ Telephone
- ☐ Other (outline)

Additional:

- ☐ Source
- ☐ Address
- ☐ Request Details
- ☐ Other (outline)

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When the sources are identified and the payloads outlined, the next step is to determine the Marketing Qualified Lead (MQL) level. A MQL is a lead that has been deemed more likely to become a customer compared to other leads.

- ☐ MQL 1 (least likely)
- ☐ MQL 2
- ☐ MQL 3 (most likely)
- ☐ BANT (Budget, Authority, Need, Timing)

## Routing. Workflow by lead source.

The lead routing engine creates your custom routing rules to determine applicable workflow for different lead types. This can include historical data (round robin), geographical proximity, product line specialities, preferred status, and dynamic performance metrics.

Routing automation will rely on mapping lead metadata by source to individual partners or sales members. Typical attributes to determine routing:

- ☐ We will have full address in the lead.
- ☐ We will <u>not</u> have full address in the lead.

When finding salespeople to handle a lead:

- ☐ The platform should only offer the lead sequentially to salespeople.
- ☐ The platform can offer the lead sequentially to appropriate salespeople from competing retailer.
- ☐ A bit of both - It depends on certain parameters.

We require different routing based on:

- ☐ Lead generation source
- ☐ MQL level

- ☐ Exclusivity conditions
- ☐ Type of product or service

Rather than traditional lead routing systems, Lead Assign offers leads to users exclusively for a time period you determine. The default timeout is five minutes (for good reason). You can set this anywhere from two minutes to two weeks. For best results, we recommend you keep this between three minutes and fifteen minutes.

For initial lead acceptance, we would like to give our partners/sales team:

_____ **minutes** exclusivity before trying another salesperson

**How big is your network?**
Network size helps to inform the level of competition that can be implemented and strategies around lead previews, when the leads should be offered, and to ensure leads are handled by the best, most applicable team.

Number of salespeople: _____

Number partner organizations: _____

## Tracking. Closing the loop.

Obtaining lead pursuit feedback is essential to understanding how your team is progressing through their leads. Lead Assign supports collecting agent feedback within the agent User Interface (UI) on mobile and desktop - without a login like most CRM's.

The process of soliciting feedback from your agents involves an automated email that is sent from your Lead Assign instance to the agent requesting feedback on the individual lead. The cadence (pursuit duration, frequency of request) of the email requests that go to your agents is a configurable and an automated process.

Lead Assign collects detailed analytics to help you convert more leads to sales. Providing this level of analytics means you want key information from your front line sales team. It's important to understand the overall structure of the how the data is collected as you think about configuring the requests to your team.

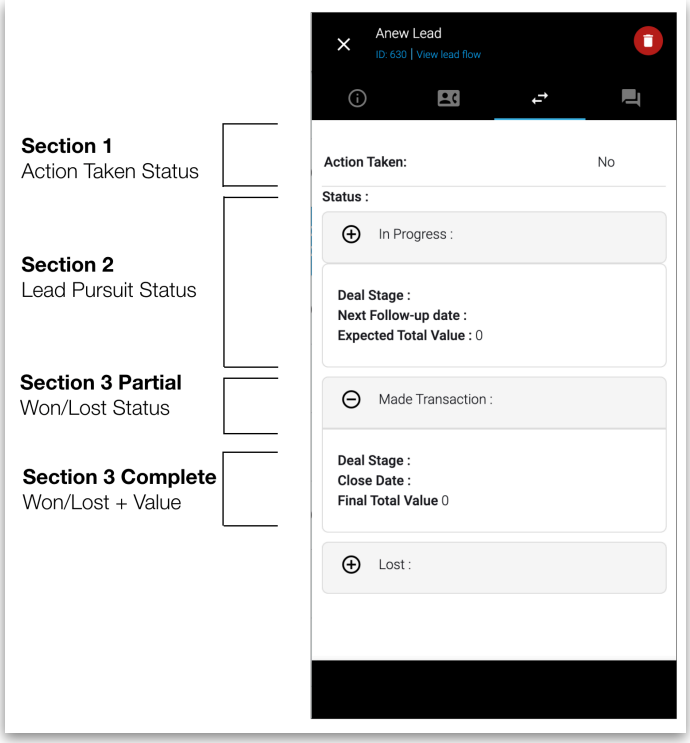
As your sales team provides lead pursuit feedback, subsequent requests are sent based on your desired cadence and the captured status'.

**Section 1** (action taken)
This means the agent confirms if the lead was contacted.

**Section 2** (status)
This means the agent provides the current status of the lead.

**Section 3** (partial)
The agent completed one of the options in Section 3.

**Section 3** (complete)
The agent completed all options in Section 3.



## Analyzing. Understanding your sales cycle.

Sales cycles differ by industry and by type of lead. Generally, your cadence for requesting how the agent is progressing with the lead should reflect your general sales cycle. If you understand your sales cycle (which is measured by the time from lead contact to deal close in its simplest form) then there are some general rules of thumb for developing your request cadence.

- ☐ Sales cycle measured in days
- ☐ Sales cycle measured in weeks
- ☐ Sales cycle measured in months
- ☐ Sales cycle varies based on product/service attributes.

Lead Assign connectors can also ensure captured information and details can be provided to your existing sales or partner management tools, like Salesforce or Dynamics. Our team had experience mapping captured level of lead pursuit details to CRM pursuit levels. It's important to determine the level of capture prior to hand-off to your CRM.

- ☐ Collect Level 1: Action Taken
- ☐ Collect Level 2: Pursuit Status
- ☐ Collect Level 3: Won/Lost Status

The cadence of requests (automated request for lead pursuit details) should reflect the sales cycle so your feedback request is matched to the partner or sales members actions.

- ☐ Request feedback once:

  ☐ Days after lead acceptance

- ☐ Request feedback multiple times:

  ☐ Days after lead acceptance

- ☐ Request feedback until:
  - ☐ Level 1 feedback received
  - ☐ Level 2 feedback received
  - ☐ Level 3 feedback received

# Automate your Lead Management

*"As the most trusted real estate brand in Canada, we generate over 170,000 leads annually from our digital channels. With Vantage+, we've automated our lead management and enable the quick response that is critical to engaging online customers with a better service experience while helping our agents and brokers be more productive."*

**Kelly McCain**
**Director, Business Services, Royal LePage**

Companies can try to implement lead automation using existing applications like Salesforce but you'll find the cost is extremely prohibitive, the lead routing capabilities are very rudimentary and not flexible, and it relies on your distributed sales force or partner actually using your instance - which is highly unlikely.

Automating your leads, the lifeblood of your marketing programs, demands a lead automation tool that is cost effective, uses AI, and provides barrier less feedback.

We can help you with that.

## The Intelligent Enterprise Lead Management Solution

Enterprise battle tested, globally scalable, localized, and purpose built to handle the demanding needs of enterprises like yours.

### Get started now.

Let's book a 30-minute discovery session to determine your needs and give you an overview of our solutions.
https://leadassign.com