



# Content Marketing Guide

October 2015

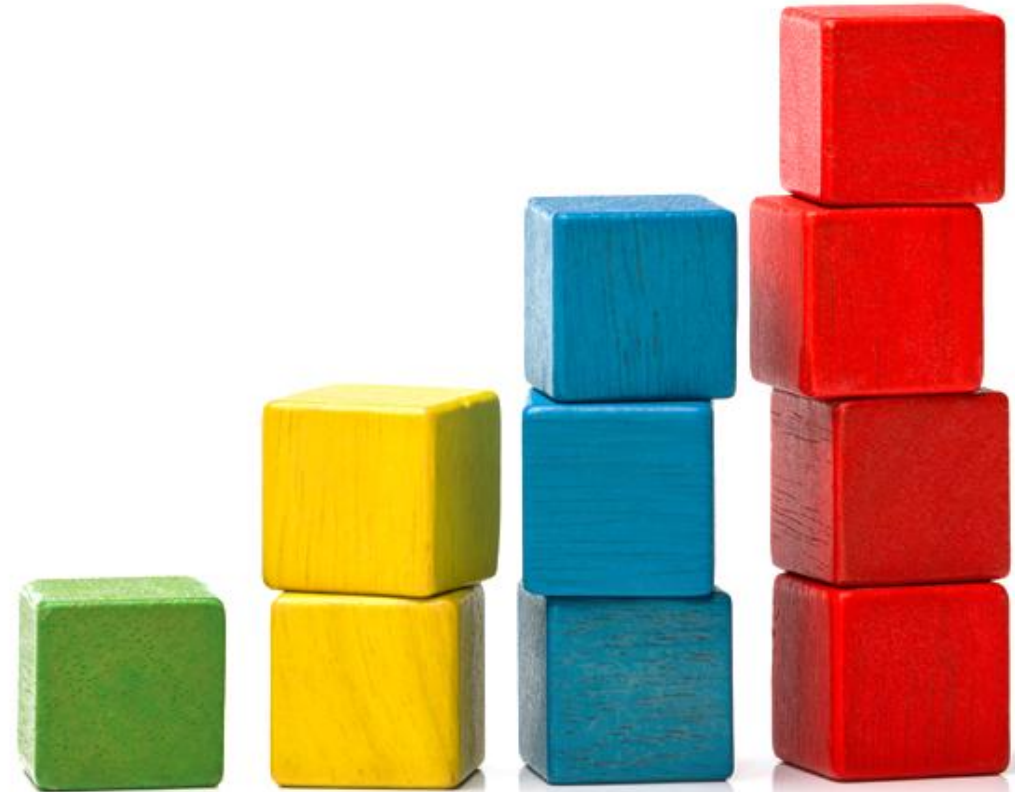


**5 LEAD MANAGEMENT  
BEST PRACTICES  
TO HELP WIN MORE  
SALES IN 30 DAYS**

# The rhythm of monthly business financials

Business marches to the rhythm of monthly financials. But what happens if sales is prone to missing a beat?

Depending on your line, we all know sales lead generation can fluctuate. For some it's seasonal, and broadly predictable. For others it may be steady, but spike or dip due to circumstances in the physical environment, such as one-time weather events, or the business operating environment.



# The rhythm of monthly business financials

Whatever the shape of the lead-gen curve, every business needs to be able maximize lead conversion. Some businesses may fail to do this effectively. Misfiring sales operations may be characterized by erratic lead-to-conversion rates, where they fluctuate without pattern and evade all attempts to make the results more consistent.

Other businesses may have a fairly steady conversion rate. However, this may be below the benchmark for the industry in question. Sometimes though it's hard to know what the benchmark is, especially if you are in a unique niche.

If sales is prone to missing a beat - or perhaps throwing an extra one in - it's difficult to set appropriate targets. Sales may be disincentivized by targets that are too difficult to hit. Conversely, the business might take a hit if targets are too low and lots of salespeople find themselves on the highest level of the comp plan.





Whether your sales conversion rates are erratic or noticeably and consistently below the benchmark, the use of lead management best practice enables sales operations to maximize lead conversion. If you happen to be in a niche all of your own, then applying best practice lets you set the benchmark!

**In this guide we discuss five best practices that help you win more sales in 30 days.**

## METRICS THAT SHAPE LEAD MANAGEMENT BEST PRACTICE

- **RESEARCH SHOWS:**

- Calling back within 5 minutes increases conversion rates 200%
- 35-50% of sales go to the vendor that calls back first
- 80% of sales agents give up by the third call
- 90% of sales are won on the 7<sup>th</sup> call
- 50-80% of all new business develops after contact 5, 6, & 7



## WHAT IS IT?

Lead scoring lets you rank each lead to determine how good they are.

Understanding the quality of each lead lets you do three important things to improve sales efficiency:

- Remove bad leads instantly
- Identify lead providers that are bad sources of prospect data
- Predict salability and make better forecasts

## WHAT WOULD THIS BEST PRACTICE DO FOR US?

With the lead management best practice of lead scoring enabling you to determine the quality of each lead, you can:

- Stop paying for leads from sources that consistently produce poor quality prospects
- Distribute leads to the most appropriate sales people. How about giving the hot leads to your order takers and the cooler ones to your best closers?





## WHAT IS IT?



A sales workflow is the organizing principle that enables effective sales force automation by guiding your team through a structured set of sales activities.

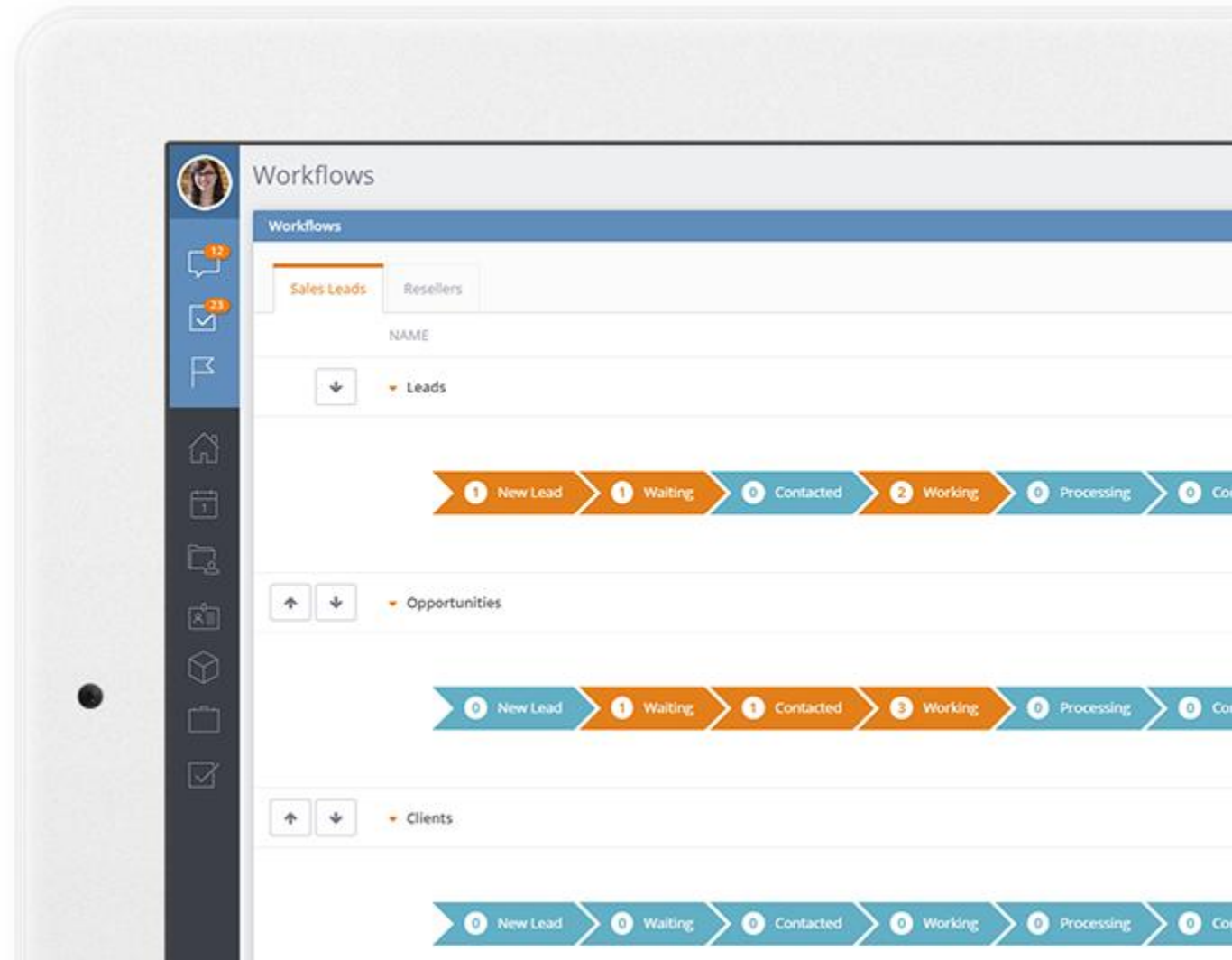
The sales workflow is repeatable set of actions that integrate the process of using key touchpoints to communicate with each lead.

- Phone Calls
- Emails
- Appointments, Demo's, In Person Meeting

## WHAT WOULD THIS BEST PRACTICE DO FOR US?

With the lead management best practice of workflow efficiency, you can:

- Optimize your lead follow up activity for B2B, B2C or whatever is most effective for your marketplace, products and services
- Create a repeatable process that is consistent, timely, and measurable
- Turn your team into a more effective sales force





## WHAT IS IT?

Automated triggers prompt the sales team when it is time to perform the next activity to communicate and attempt to close each prospect.

The sales team member to which each lead or contact attempt is assigned is alerted at just the right moment with:

- Automate tasks
- Notes
- Reminders

## WHAT WOULD THIS BEST PRACTICE DO FOR US?

With the lead management best practice of automated triggers integrated as part of your follow up process, you can:

- Contact prospects using the appropriate communication channel
- Schedule the intervals between your contact attempts appropriately
- Make sure your sales team carries out workflow activities at the right time. Sales don't just give up after three attempts...

The screenshot shows the 'Edit Appointment' form with the following fields and values:

- Subject:** Document Signing
- Description:** Notify Test
- Create For:** Gabe Buck
- Appointment Start:** 4/29/2015 12:00 PM
- Appointment End:** 4/29/2015 12:30 PM
- Appointment TimeZone:** Eastern Time
- Is Complete:** ☐

Below the appointment fields is a section for **Lead Details** with a link to **Open Lead**:

Name:	Crispy Clean
Phone:	631-555-1212
Email:	mail@robalfano.com

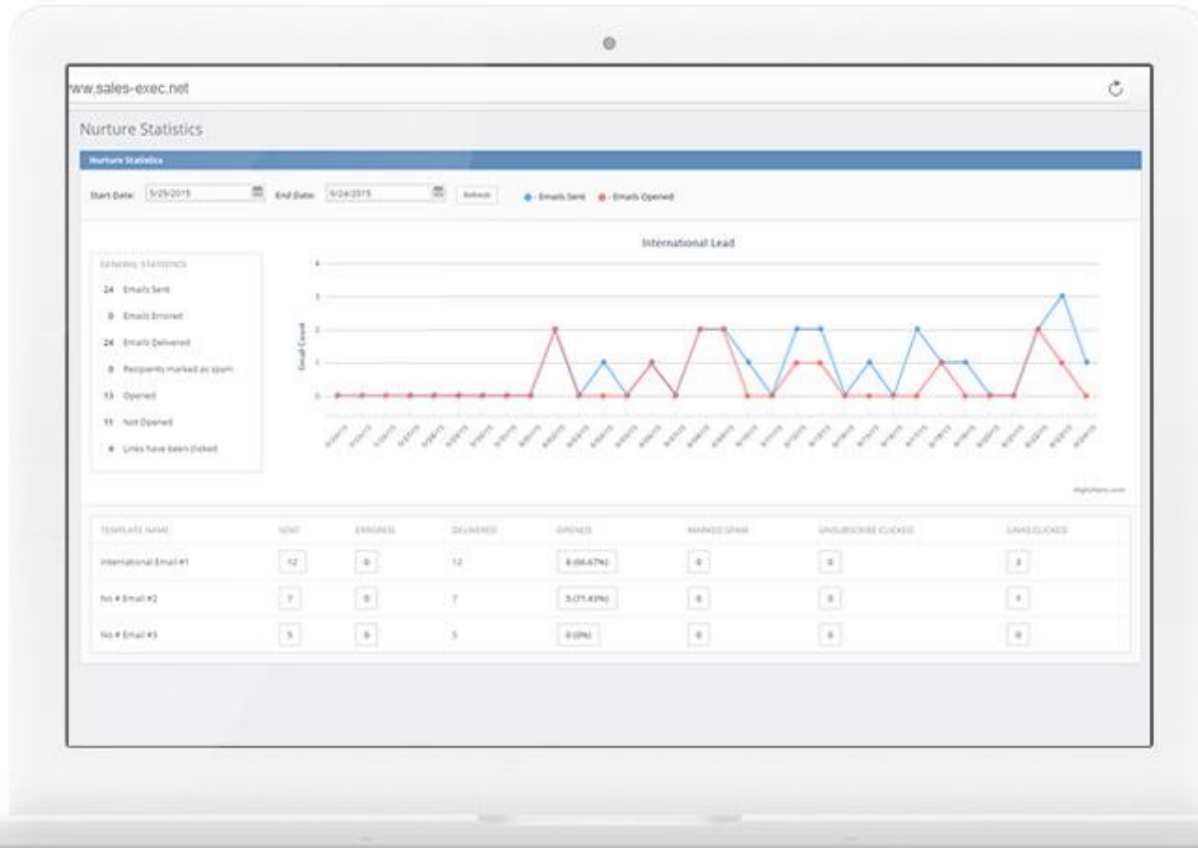
At the bottom right of the form are two buttons: **Close** and **Save changes**.

## WHAT IS IT?

Automated email marketing lets you structure email communication and integrate direct mail activity.

Automating email communication lets you:

- Set up an automated email campaign to follow up new and recent leads
- Set up drip email campaigns to provide a continual 'touchpoint' with older prospects
- Integrate rapid direct mail activity with templates or mailouts





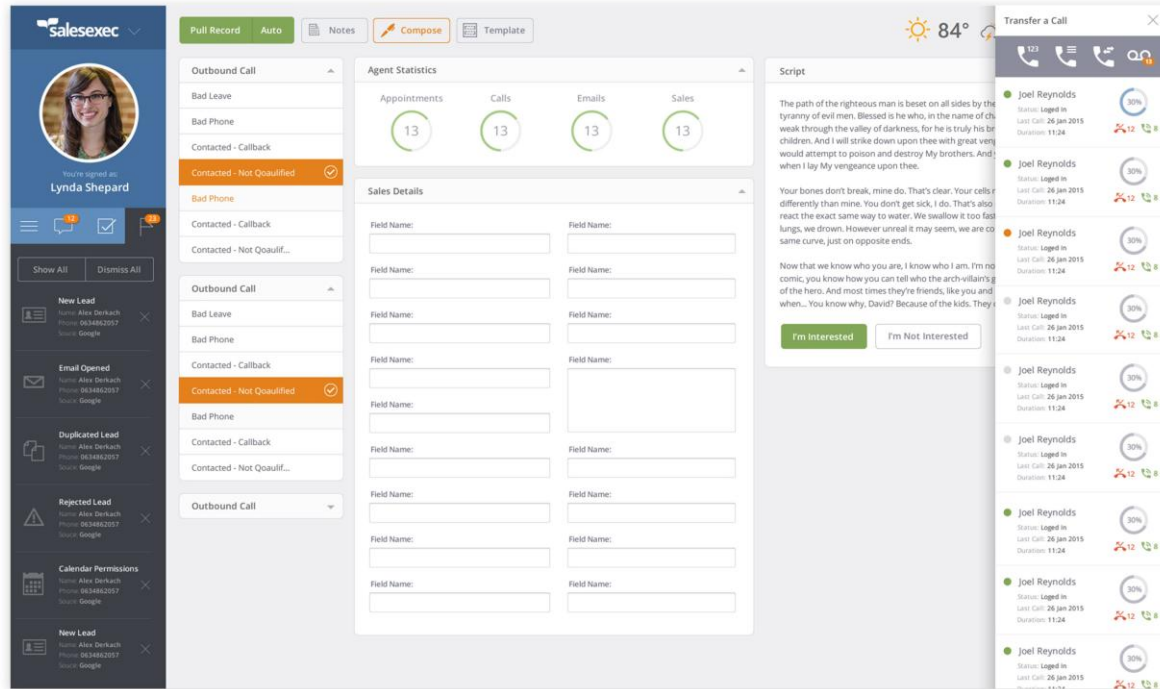
## WHAT WOULD THIS BEST PRACTICE DO FOR US?

With the lead management best practice of automated marketing you can:

- Help to maximize 'long tail' conversion by providing touchpoints with your database of leads you didn't manage to convert immediately because only 25% of leads are actually ready to buy
- Integrate direct mail which is often especially useful for providing touchpoints with prospects that favor technology less
- Help to maximize Lifetime Customer Value by providing touchpoints with your database of historical customers



# Use sales team time more effectively



## WHAT IS IT?

Technology on the desktop helps sales agents to use time more effectively.

Desktop technology lets sales teams reduce or eliminate time wasted by routine processes or the need to discover the leads that still require follow up:

- Power dialer automatically calls leads
- Agents pull out leads that need to be contacted

## WHAT WOULD THIS BEST PRACTICE DO FOR US?

With the lead management best practice of using desktop technology that automates and helps eliminate time soak:

- Sales agents click once to dial and call leads that have not responded to previous sales team contact attempts or that have not been closed
- Un-responded or non-contacted leads are delivered directly to agents for follow up
- Your Sales & Marketing VPs and managers don't waste time distributing leads



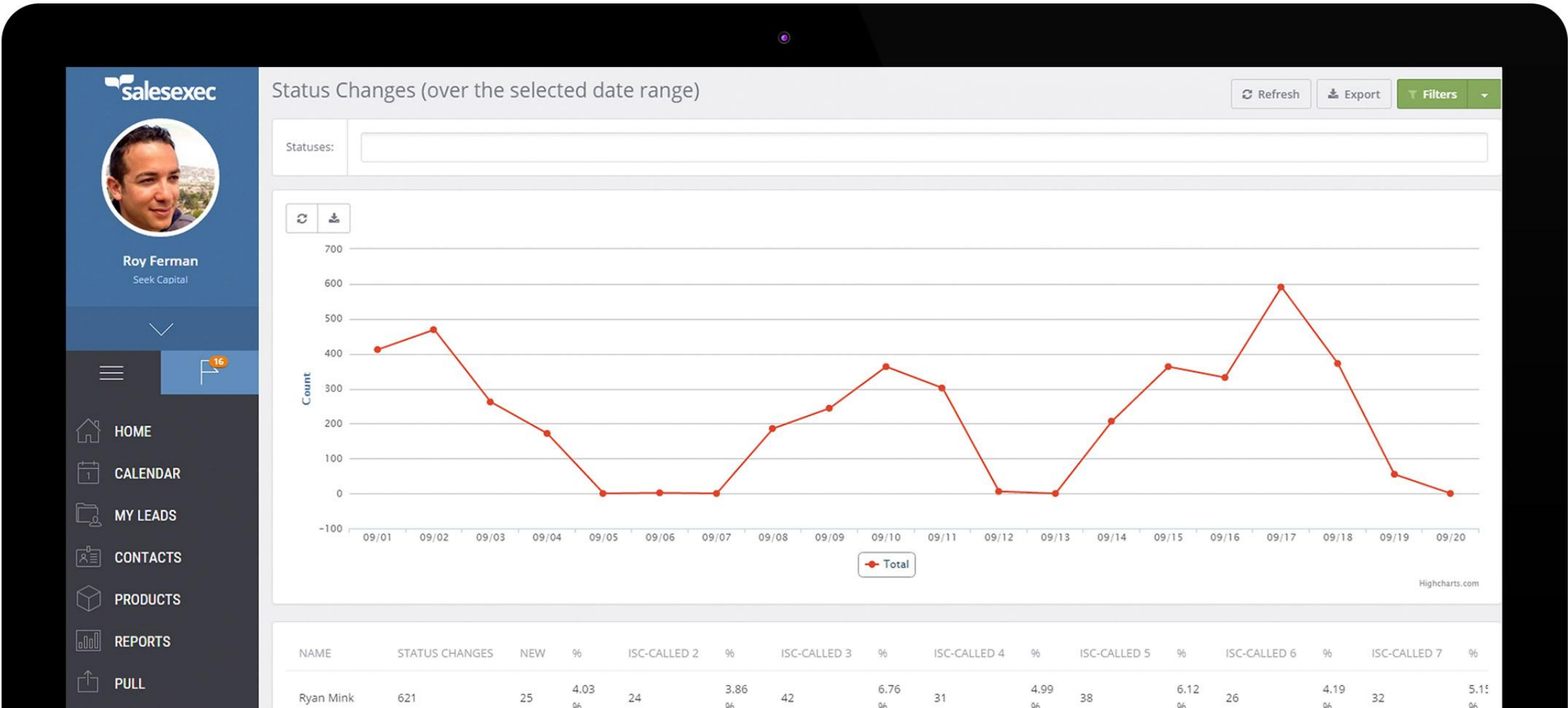
## METRICS THAT SHOW HOW AUTOMATED LEAD MANAGEMENT SOFTWARE SUPPORTS BEST PRACTICE

Automated lead management processing enables prospects to be contacted within 2 to 3 minutes

Efficient over medium and large scale operations, even over thousands of agents spread across multiple call centers

Best solutions support outside sales equally effectively as inside sales by using mobile enablement technology to deliver the right data in the right way to field agents

# How lead management software supports best practices







## WIN MORE SALES IN 30 DAYS WITH CLICKPOINT

ClickPoint Software offers automated Lead Distribution, Marketing Automation, and Lead Management solutions for leads acquired across multiple channels.

Our solutions provide value, helping our customers to generate more ROI from marketing by:

- Enabling sales teams to close more leads in less time
- Maximizing lead value by capturing, routing, and scoring leads



## ABOUT CLICKPOINT SOFTWARE

ClickPoint Software is a lead distribution and lead management company dedicated to decreasing costs and increasing ROI for our customers. Our easy-to-use, easy-to-implement software gives sales and marketing teams the tools they need to distribute, track and manage leads in real-time, helping to increase conversion rates. Unlike other lead management software, ClickPoint offers a complete solution that can stand alone or integrate with existing systems. ClickPoint Software products help our clients – from the Fortune 500 to small and mid-size businesses – increase efficiency and decrease cost so they can improve ROI in as little as 90 days, so they can focus on profits, not process.

