



# **DELIVER AND CLOSE MORE LEADS!**

SEND LEADS INTO ANY  
CRM, HERE IS HOW

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# Lead Distribution Matters to Successful Lead Gen

→ Understanding the Problem

→ Lead Distribution Facts

## Understanding the Problem

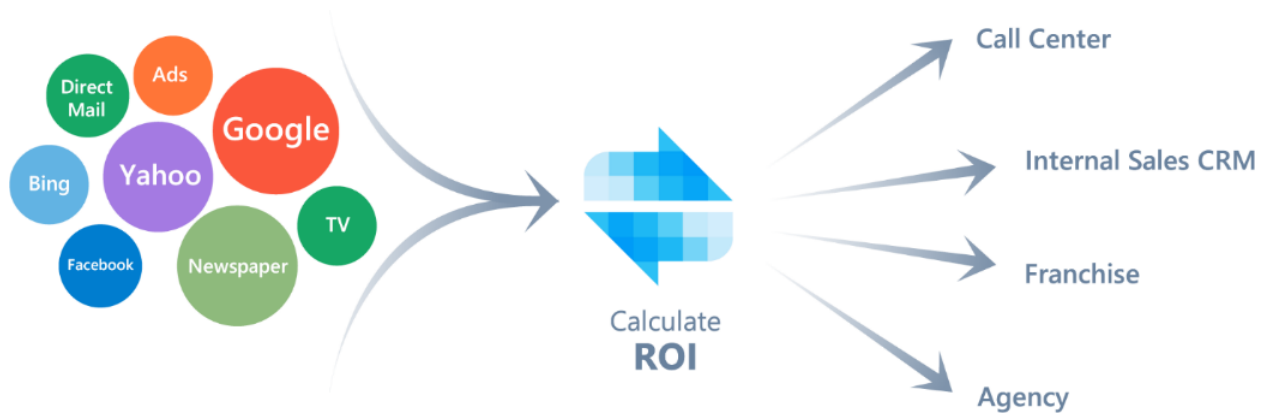
### Big and small companies with big problems

Big and small companies that create leads have to deliver those leads while integrating with many different software solutions in order to accurately calculate ROI from lead generation activities. While this seems obvious there are still many large companies, agencies, and lead generation firms that collect a lot of leads and are currently using many solutions bolted together to try and tackle this problem.

Additionally, organizations need to get these leads to their sales floor or lead buyers as fast as possible. In many cases, companies may also have franchisees, contractors, agencies, and call centers that also want leads delivered in addition to their internal sales teams. This is lead delivery that is external and where lead distribution solved an immediate problem.

### **BEFORE WE GET TOO FAR LET'S DETERMINE WHAT YOU ARE TRYING TO DO WITH YOUR LEADS**

Are you a B2C company that markets to consumers and therefore creates lots of leads? Do you want to track leads, send them to external sales teams? Or do you just want to capture leads and work them with an internal sales team? If only capturing and sending leads to one or more internal sales team, please consider lead management software vs. lead distribution software. You don't need the advanced options of sending data externally out of the solution. Are you a company that aggregates leads and wants to sell them? This may seem strange to group these two types of businesses together but they actually have similar needs and pain points. If you are a lead generation company or marketing agency, your pain generally occurs around lead delivery to external solutions combined with the fact that you need to record lead sales as a transaction.



## Lead Distribution Facts

In a March 2011 an independent study conducted by the Harvard Business Review found that only 37% of 2,241 audited companies responded to their leads in one hour or less. In 2012 we conducted our own research that showed several large call centers with over 1,000 agents each increased their closed deals by nearly 20% by reducing contact time from 45 minutes to 5 minutes on average. In case you need further evidence that this is not an isolated incident don't just take our word for it.

1. Leads that are called in the first 5 minutes increases the ability to convert to a sale by 200% (Source: MIT)
2. 35-50% of sales go to the vendor that is first to respond (Source: InsideSales.com)
3. Companies with mature lead generation and management practices have a 9.3% higher sales quota achievement rate. (Source: CSO Insights)

***So, based on this information every company that creates and purchases sales leads must be using lead distribution or lead management to enable these best practices, right? Wrong.***

4. 45% of businesses claim they do not have standardized sales and marketing processes (Source: Forrester Research)

***We have all heard these statistics so why have companies been slow to adopt lead distribution and or lead management solutions with these kind of statistics barraging corporate America at every trade show?***

5. 90% of sales leads are won on the 7<sup>th</sup> call (Source: ClickPoint Software)
6. Of the 80% not ready to buy 79% will never be followed up (Source: Marketing Sherpa)
7. Only 13-20% of leads are ready to buy now (Source: ClickPoint Software)
8. 80% of sales agents have given up on leads by the 3<sup>rd</sup> attempted contact

9. 79% of leads never convert to sales. Lack of lead nurturing is the common cause of poor performance. (Source: Marketing Sherpa)
10. Nurtured leads produce a 20% increase in sales opportunities (Source: DemandGen Report)
11. Implementing lead nurturing will decrease cost per lead by 33% (Source: Marketo)

***Why then are there companies that are resistant to launching a lead distribution, lead management, and lead nurturing solution?***

1. It could be lack of a clear best of class solution that is easy-to-use, deploy, and adopt. It's one more piece of complicated software to roll out, right?
2. It could be that until decentralized lead distribution solutions were developed and introduced to the market there was no easy way to get leads flowing into many different software solutions, therefore the challenge was too daunting.
3. It could be time and or budget constraints, but given the statistics it would seem the other reasons would be more likely.



35-50% of sales go to the vendor that is first to respond



Leads that are called in the first 5 minutes increases the ability to convert to a sale by 200%

9.3

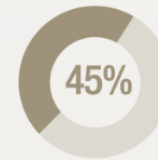


Companies with mature lead generation and management practices have a 9.3% higher sales quota achievement rate.

33%



Implementing lead nurturing will decrease cost per lead by 33%



45% of businesses claim they do not have standardized sales and marketing processes



80% of sales agents have given up on leads by the 3rd attempted contact



90% of sales leads are won on the 7th call



Only 20% of leads are ready to buy now.



Of the remaining 80% not ready to buy nearly all of them will never be nurtured

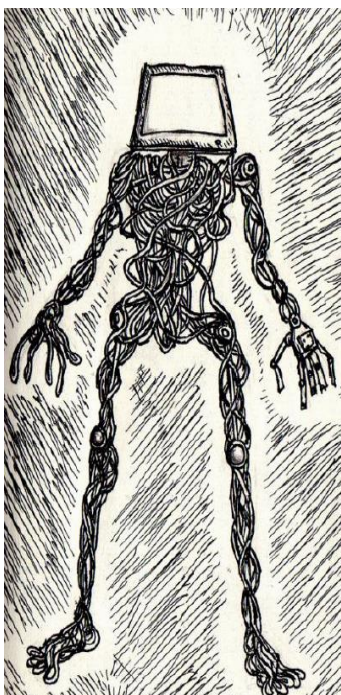


# No Pain, No Gain

- Building a Monster
- Using a CRM to Distribute Leads
- Questions to Think About
- Lead Distribution Comparisons
- Cost of Ownership
- Lead Distribution Requirements
- Integration Work Building a Monster

## Building a Monster

Now that we know you need a lead distribution solution, let's talk about how you should pick a good one. The first thought you are having is pretty normal, should we build a solution internally, correct? If you haven't already tried to build a system internally here are some of the frequent pain points we come across from companies that tried to implement an internal solution.



### **WARNING:** Building a Monster is Bad!

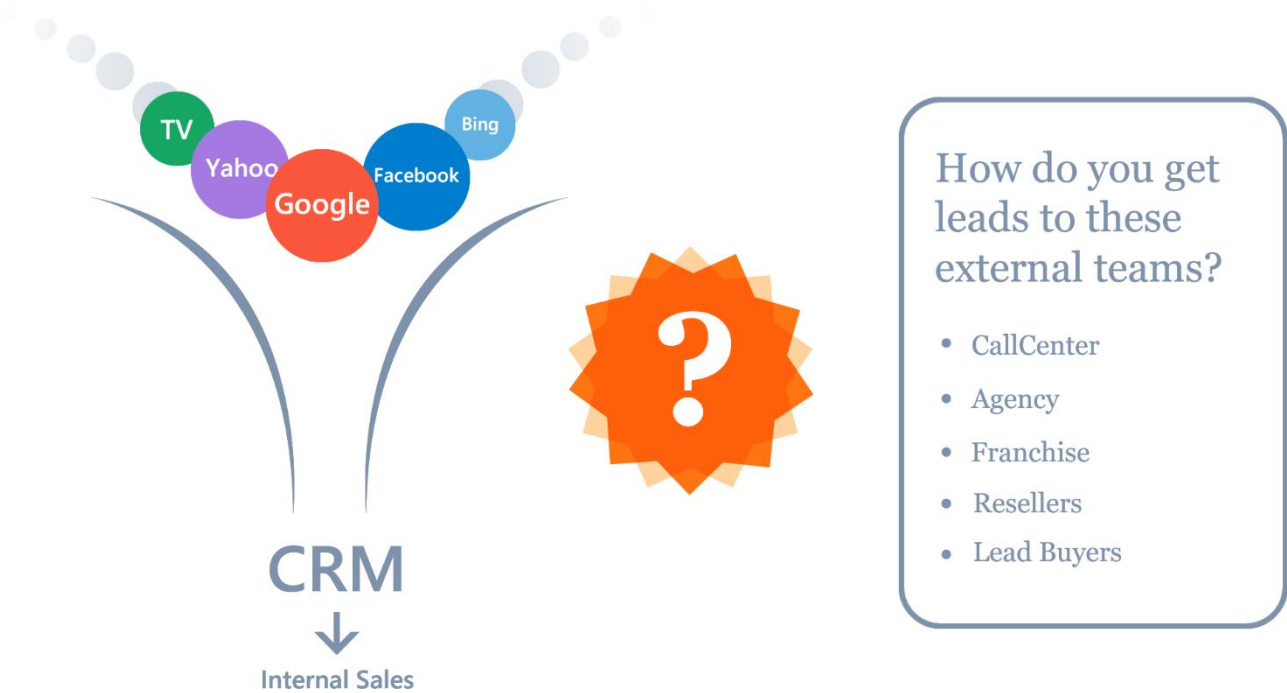
1. Likely, there is a team of developers that come and go and have been building on top of the existing system for years.
2. Outages are frequent and there are most likely breakdowns on a monthly basis
3. It takes a day or two and is cumbersome to create
4. Updates like setting up a new lead source will take a week and a statement of work to be added before IT will help you get an integration completed
5. Likely there are many manual functions like retrieving reports or importing data

If this sounds familiar it should. We encounter these very issues with every corporate team we meet that has built or attempted to build an internal solution. Building an internal solution is just not the core of your business. You built it because you had no other choice. You had no way to compare the cost to do it internally vs. an outside provider. If you are confused by all the different types of software, like marketing automation, CRM, lead management, and lead distribution you should be, it's a lot to take in.

## Using a CRM to Distribute Leads

The pain point most B2C, B2B, and lead generation corporations face is centered on the idea that CRM can solve these complex problems for them. For all of its great accomplishments, CRM is not built to distribute leads and data externally from the solution into other solutions easily. Yes, you can use an open API and create integrations, but that is not ideal. CRM has been around for a while and if companies were able to successfully use it to do what lead distribution can do the statistics shown earlier would not be so abysmal.

CRM software is a centralized solution with no real way to send data or leads from it while playing nicely with other solutions. Many have tried to Frankenstein a CRM solution and many have failed. Trying to make CRM fit inside of your needs is just not the right way to go about it. CRM is not designed to route leads and phone calls in seconds to any third party software solution.





# Questions to Think About

- A. *What happens if you are a company that has franchisees, all using different software solutions to manage contacts and leads? Will you require them to use your solution or will you let them continue to use the solution they have paid for?***

Lead Distribution delivers leads into any CRM (RNT, Salesforce, SAP, Netsuites) so that your franchisees are free to use whatever sales solution they like.

- B. *What happens when your lead buyers demand you send leads into multiple solutions, while giving their sales agents a Text SMS notification, and an email notification?***

Lead Distribution delivers leads via post, XML, Get, email, Text SMS, Via Phone Routing, and Ping and Post. You can generally deliver leads into a solution while at the same time sending notifications.

- C. *What happens if you have call centers, internal sales, corporate branches, and franchisees that you need to deliver these leads to? Having different software solutions and the need to adapt to your software sounds like a root canal to them.***

Provide a simple web-based lead management solution they can use to get leads, return leads, order leads, manage appointments, assign leads, and get lead notifications. For the call centers you supply a basic solution that interfaces with their existing dialer solution. For franchisees you give them the option to either use the provided lead management tool or deliver their leads straight into their existing solution.

- D. *How do you get real-time information about lead source performance to make critical decisions about leads?***

Some marketing automation solutions may provide stats on the cost associated with acquiring a lead but do they tell you what happened to the lead in real-time? If the lead turns into a sale are you able to get that sale information from your CRM solution and match it to your marketing automation solution? Real-time information is pivotal to success. Lead sources and marketing channels need to be turned off immediately if they supply bad leads. The cost to your company is measured easily by low sales moral due to bad leads continually being supplied to the sales floor.

- E. *What happens if you spend money on marketing and don't know the results for weeks or months?***

Lead Distribution will generally provide this information in real-time and connect the dots between your CRM system, sales solution, call center software, and more so that you make timely decisions about your marketing budget. A true solution will tie marketing to sales so that results are transparent and immediate.

- F. How can you show the CEO reports that validate your marketing decisions? Do they wait to hear from the sales team regarding lead performance?

CRM does not report on leads the same way lead management and lead distribution does. Most CRM solutions provide excellent reporting post sale but do little to tell the story of what happened with the leads that came from the marketing department efforts. Did the sales team call, email, nurture the leads or did they neglect them? How would you know? You only hear from the sales team when things go wrong, like missing a quota.

## Lead Distribution Comparisons

### How Does Decentralized Lead Distribution Differ from Other Solutions?

The best way to think about Decentralized Lead Distribution is to think about what it isn't. It isn't marketing automation, CRM, or Lead Management. It isn't all things to all people and it serves a very specific purpose that until recently has only been developed internally by companies with large and funded internal development teams. Of course you had the advent of form companies and there has even been some industry specific solutions that provide some of the features but nothing that offers a full suite of tools needed to efficiently handle the job required by many companies.

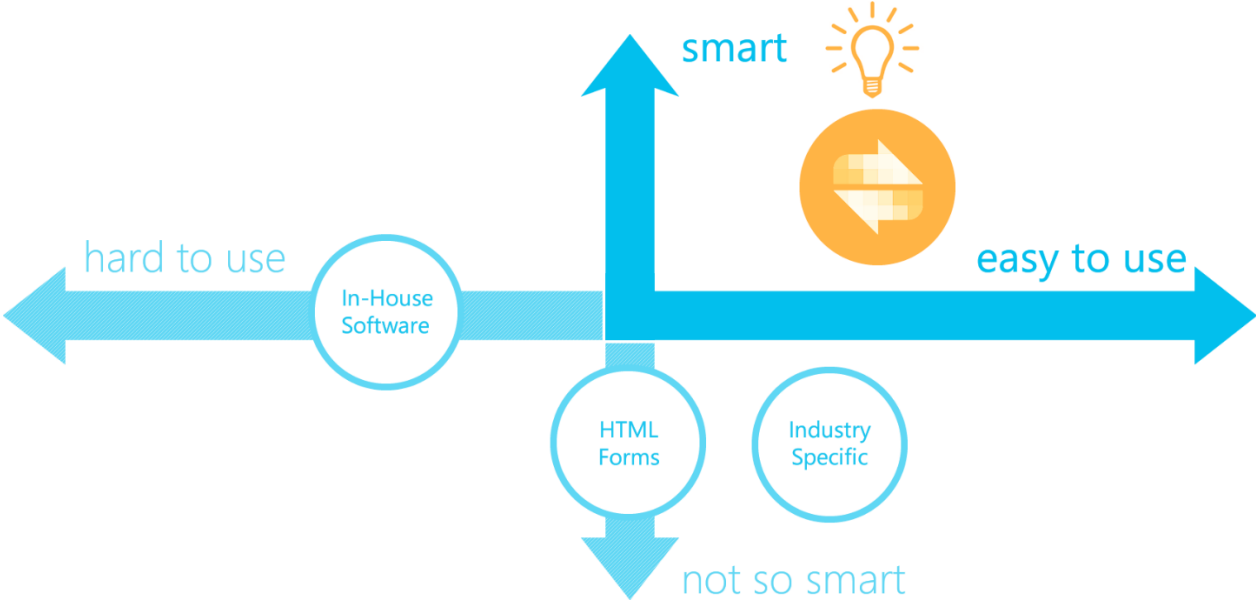
### COMPARISON 1 - CORPORATE USERS

	Decentralized Lead Distribution	CRM	Marketing Automation	Lead Management
Ability to capture phone and internet leads	Yes	Yes with upgraded service for phone	Yes / Some only internet not phone	Yes
Ability to route internet leads and phone calls into any CRM using HTTP Post, Get, SOAP, Ping and Post	Yes	No / Possible with API but not easy	No	No / Possible with API but not easy
Ability to route leads via email with a link, a .CSV attachment, Text SMS, Live Call Transfer	Yes	No	No	No
Ability to route leads externally based on zip, area code, and country to external applications	Yes	No	No	No
Ability to route leads externally, based on percentage, time, round-robin, recycle, performance and price.	Yes	Internal Maybe	Internal Maybe	Internal

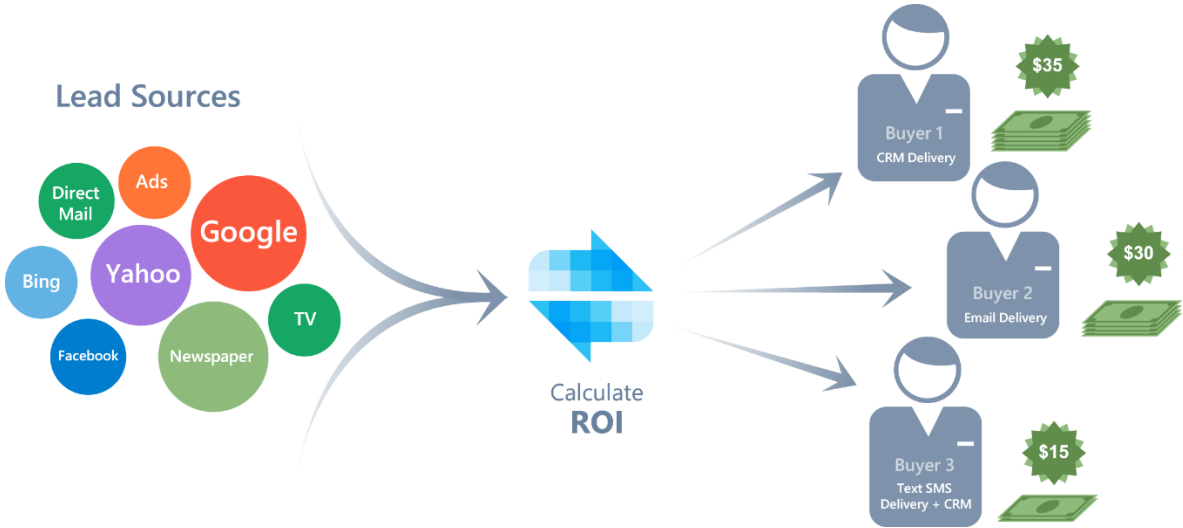
We addressed this very topic at LeadsConn NY, 2012. If you would like to review this presentation you will find it listed as: [LeadsCon 2012 – Buy vs. Building a Lead Distribution System](#)

### DRAWING DISTINCTIONS

Steve Jobs explained how iPhone would change the world by being both smart and easy-to-use where most smart phones were smart but incredibly difficult to use. With Lead Distribution the focus is on leads, nothing else.



Just like B2C and B2B verticals lead selling companies take in leads from lots of different marketing sources and need to distribute those leads by integrating with other software solutions. In order to be successful, a lead generation company needs to be able to send data in any manner a potential customer requests it. Now you understand the correlation, and why a Lead Distribution solution serves these two types of businesses very well by providing a way to send the data while integrating with all types of software solutions, thereby eliminating custom development.



## COMPARISON 2 - LEAD SALES USERS

	Decentralized Lead Distribution	Forms	Marketing Automation	Lead Management
Ability to capture phone and internet leads	Yes	Yes	Yes / Some only internet not phone	Yes
Ability to score leads using real-time phone, address, IP, and comments on field.	Yes	No	Yes	Yes
Ability to route internet leads and phone calls into any CRM using HTTP Post, Get, SOAP, Ping and Post	Yes	No	No	No / Possible with API but not easy
Ability to route leads via email with a link, a .CSV attachment, Text SMS, Live Call Transfer	Yes	Some can do email delivery but not based off of logic	No	No
Ability to route leads externally based on zip, area code, and country to external applications	Yes	No	No	No
Ability to route leads externally, based on percentage, time, round-robin, recycle, performance and price.	Yes	Internal Maybe	Internal Maybe	Internal
Ability to create live call transfers	Yes	No	No	No
Ability to create lead orders, invoices, transaction logs, and automate payment for leads	Yes	No	No	No
Ability to provide lead source portals for vendors and affiliates	Yes	No	No	No

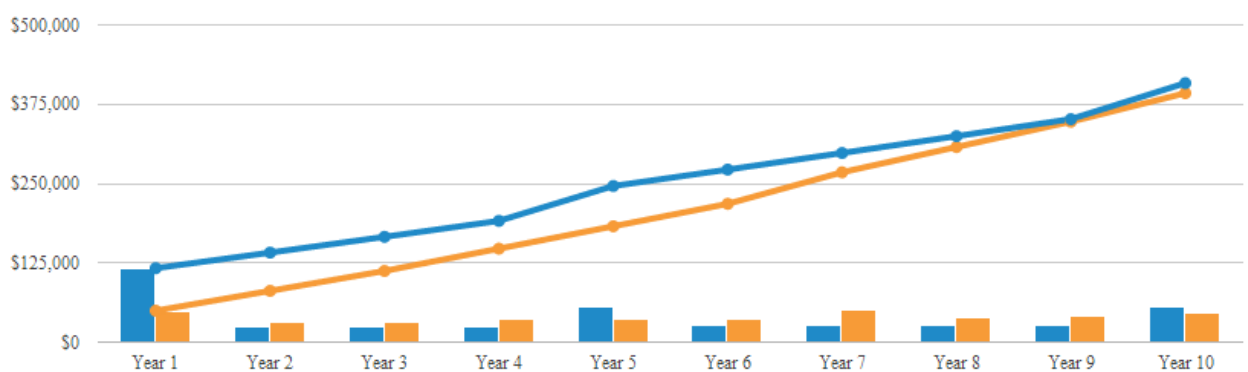
# Cost of Ownership

Is it worth it? Well, think about the costs associated with running an internal system, not to mention the time it takes to execute a software development roll-out. You can use the Software Advice, **Total Cost of Ownership Calculator**, to get a better idea of what it might cost to implement an internal solution vs. purchasing a Software as a Service solution. Keep in mind the statistics we covered earlier and use them to establish an ROI based on instituting a lead distribution solution vs. doing nothing.

[Link to Calculator →](#)

## On-Premise vs. Software as a Service

Share 



We have found many companies that spent on the low end around \$200K and upwards of \$3MM to build an internal Lead Distribution Solution. You should ask yourself if you are in the business of creating leads, selling a service, selling a particular product, or building software. Yes, that opinion is slanted, but the reason is simply because we get calls from both big and small companies where building internally has not worked. We don't really get calls from companies where it all worked out.

It's actually really easy to validate cost if you know a few key statistics.

1. How many leads do you currently generate monthly?
2. What is the current closed sale value?
3. What is your current close deal percentage?
4. What is the total monthly revenue generated from leads?

If you take these stats and add them up you will get something like this:

Lead Type	# of Leads Monthly	% Total	Avg. Closed Deal	Close %	Leads Closed	Total Monthly Revenue
Lead Type 1	1,000	56%	\$3,500	24%	240	\$840,000
Lead Type 2	600	33%	\$2,000	23%	138	\$276,000
Lead Type 3	200	11%	\$1,000	19%	38	\$38,000

We can get all kinds of crazy and add things like monthly recurring revenue, long-term value, cost to acquire a customer, but remember that were trying to keep this simple. You create leads; lead distribution optimizes the delivery of leads. There is value in showing simply that if you are able to reduce contact time by 20 minutes, it could have a 10% increase in monthly revenue. In order to prove this you need to know what you are currently doing. If you are doing nothing you have an even more compelling case because you don't have the benchmark data to make key decisions.

If you reference the statistics from our infographic, the only thing to establish is if your sales team is really working their leads at optimal levels. Before you put your neck on the line you need to know answers to these questions.

1. What is our lead nurture program?
2. What is our contact time on new leads?
3. How many times do we call leads?
4. Do we have sales best practices?
5. For external teams, do we track if they working the leads we provide?  
*(Do we even know if they have looked at the leads, responded, or talked to them?)*

If you have this information it is very easy to compile and make a case that you could be bringing more bottom line revenue to your organization by implementing a better lead generation and lead distribution program.

# Lead Distribution Requirements

(Corporation, Agency, Lead Generation Firm)

Decentralized lead distribution is the term that applies to the software that can enable leads to be contacted in under 5 minutes. Decentralized lead distribution solves specific lead delivery issues not adequately addressed by simple lead management solutions or CRM software. Until this software was developed there were many challenges that corporations faces in order to enable lead delivery to multiple locations.

## REQUIREMENTS

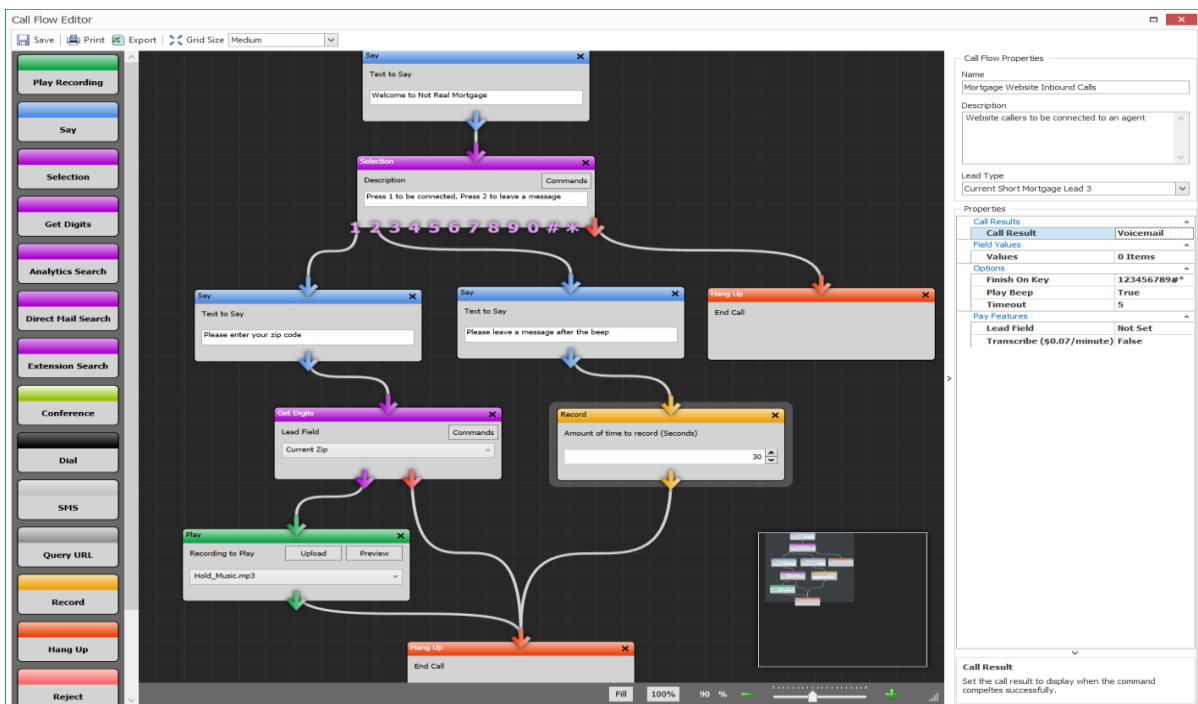
- a) Capture data from landing pages, website, phone, call centers, direct mail.
- b) Sort data, filter data, distribute data in real-time to various software solutions.
- c) Be able to perform various data transmission types
  - *HTTP post for some CRM's*
  - *XML for many newer CRM's*
  - *GET or SOAP post for some older CRM's*
  - *Possibly ping and post for certain verticals*
  - *Deliver data and leads via email*
  - *Deliver in-bound phone calls in real-time using call routing*
  - *Deliver and route live call transfers*
  - *Deliver Text SMS notifications to sales team members in the field or to lead buyers*
- d) For those on your sales team or franchisees that have no CRM or lead management solution in place, provide one, preferably that feeds closed deal information back to your lead routing solution.
- e) Record calls, track calls, set up complex call flows. Associate many phone numbers with landing pages, direct mail, yard signs etc.
- f) Track if data made it to other solutions and ensure successful delivery with a response from a third party software solution.
- g) Track ROI, activities, and be able to measure data that was delivered, actioned, and closed.
- h) Be able to provide lead orders for external lead buyers such as agencies, clients, or franchisees. We see more and more of this by not just lead generation companies, but normal corporations that want their resellers to have some skin in the game.

For a marketing executive thinking about implementing something like this, it may seem daunting and it can be. Implementation can take a month to 6 months, or more, depending on the amount of integration work that needs to be done.

## Integration Work

### INTEGRATION WORK CAN INCLUDE:

1. Integrating landing pages
2. Integrating your main website
3. Experiencing multiple lead capture pages
4. Creating offline marketing strategies that require using phone numbers for lead capture
  - a. Setting up complex call flow and rules \*see below
5. Live call transfer integration with call centers and dialers
6. Third party validation services like Experian or Acxiom
7. Integrating third party lead sources that need to send leads direct into your solution





# Steps to Launching In 30 Days

How Does Implementing A Lead Distribution Solution Help My Bottom Line?

→ Scenario 1 - Manual Push

→ Scenario 2 - Using CRM

First, let's talk about all of the available options you have with a lead distribution solution that will enable you to streamline your lead routing to your sales teams, franchisees, contractors, and call centers. You already know from the statistics that it can help your bottom line; now let's explore some of the ways big companies use lead distribution. Here are a couple of real world scenarios that are pretty common.

## Scenario 1 - Manual Push

Company X manually pushes leads and has a non-technical sales force. They believe it would be too costly to implement a solution and the benefit is too hard to quantify. Company X has a website and a couple of partners that provide their leads.

- For the past few years these leads have been manually pushed to various sales teams throughout the US.
- The marketing team is generally responsible for creating very intelligent strategies that create interest in Company X but ultimately their job performance is measure by quarterly revenue.
- Company X expands into Canada and Mexico and now has franchisees that need a solution.

### ***Sales Team Experience***

- Sales members are mostly non-technical but very proficient regarding Company X products and services.

### ***Lead Distribution Deployment***

- Lead Distribution solution captures leads and phone calls from partners and website and provides real-time reporting.
- Lead Distribution solution uses (zip code + postal code +country code + sortation) for immediate (3-5 second) lead routing in US as well as Canada and Mexico.
- Lead Distribution solution groups sales territories by NE, SE, NW, SW and routes leads by these groups, enabling reporting by group.
- Lead Distribution tracks which sales teams are opening leads, working leads, and closing leads.
- Lead Distribution integrates with several new franchisees CRM solutions.

## RESULTS

- Marketing is now able to increase marketing budget because expense is immediately quantifiable and measured.
- You are able to establish marketing budget by territory based on real-time sales information.
- Reseller and franchisees relationships are strengthened because you enabled them to be more successful with the leads you provide.
- You have been able to limit lead flow to partners not working leads in a timely manner and route the leads to teams that are working them aggressively.

## Scenario 2 - Using CRM (with franchisees, resellers and contractors)

Company X has contractors all over the US and Canada. They currently e-mail leads to contractors and resellers. Internally they use a CRM solution to push leads to sales teams.

- Company X uses their CRM to manually assign leads to top performers as a reward for being the best.
- Company X uses the CRM solution to provide reports and get a sense of the pipeline for each sales team.
- Company X sets up new franchisees and resellers with this CRM solution and requires them to use it if they wish to resell their products.

### ***Sales Team Experience***

- Sales team members seem to be proficient with the CRM tool, however, you don't really know how they are working their leads. Could it be better?
- Franchisees and resellers are very savvy and many have implemented their own sales solutions.
- Contractors are less savvy and spend a lot of time out in the field away from a computer.

### ***Lead Distribution Deployment***

- Lead Distribution routes leads in seconds to existing CRM for internal teams based on percentage or weight combined with skill set. CRM never had the ability to route leads this way but now you can easily setup this type of delivery.
- Lead Distribution solution continues to provide email delivery for non-sophisticated contractors, however, it directs them to a basic lead management solution where they can see all of their leads. They can easily update leads and the marketing team can ensure they received the lead and are working them.
- Lead Distribution now emails not only the contractor but also the customer informing them who they have been matched with.
- Lead Distribution routes leads instantly to franchisees with sophisticated solutions.

- Lead Distribution solution now shows reports in real-time and allows the marketing team to create custom reports that show sales revenue broken out by territory, week, day, and team member.
- Management decides to roll out a pull based system to increase results from leads.

## RESULTS

- Contractors now prefer the simple lead management tool because it doesn't have so many options and terminology that doesn't relate to their day-to-day job.
- As a result from email notifications customer engagement is up and you have noticed good reviews from customers about your response to their interest.
- While some top performers get the larger percentage of distribution, the lead flow is distributed evenly and quickly. You can spot problems with teams and the simple fact that they now know that results are immediate, they improve their performance.
  - You decide to change the distribution to weighted and ensure distribution is a little more evenly allocated.
- Rather than forcing franchisees to use your CRM solution you send leads into the solution they already paid for. Franchisee relations improve and subsequently sales improve.
- Because of the new access to information management decides to roll out a pull based system for those who want to participate. Sales increase by 30% in the first month and results continue to improve.

# Lead Gen - Let's Get Started

→ B2C Lead Generation

→ B2B Lead Generation

## B2C Lead Generation

In 2013 my best friend Ben reached out and asked if I would look at his marketing campaigns and see if there were some way he could increase the amount of business he would do in 2013.

Now, the great thing about Ben is he is one of the hardest workers I know. He takes a tremendous amount of pride in his work and he is great with his customers. He provides what I and others call WOW service. He has done so well that in just two years he has over 125 positive reviews from his customers for heating and ac installation on Home Advisor formerly Service Magic. In his area of Hampton Roads he has more reviews than any other contractor with a team of less than 10 people. So, Ben is already doing well, however, Ben has leveled out. He hasn't seen much of an uptick in business in 2012 and he asked me to see what we could do to help. He wanted to start off 2013 with a plan to increase the amount of leads and sales he was getting from online and offline sources. The great thing about this story is that it's relatable to both small businesses, mid-size, as well as enterprise. The first place you should always start is sitting in a call center, talking to sales guys and understanding what it is that they do on a daily basis. For Ben, I know he is good at sales so where is the breakdown?

Ben wanted to do the following:

- ✓ Increase his sales
- ✓ Increase his close rate on leads
- ✓ Find out which marketing sources were really working
- ✓ Increase his natural website ranking
- ✓ Find out if his sales guys and installers were responding to leads appropriately

## ASSESS THE ADVERTISING BUDGET

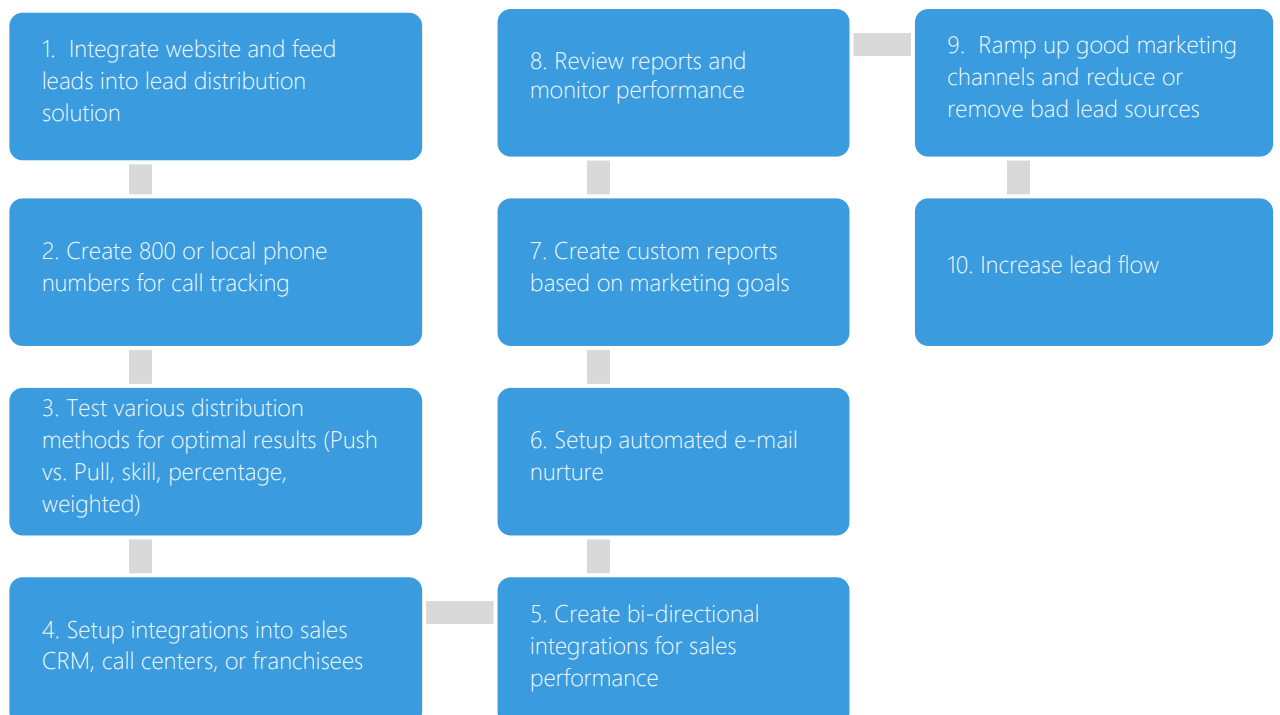
Ben has a solid marketing budget and he invests in Home Advisor, Angies List, Google CPC, some Mailer campaigns, Yard Signs, and Radio.

## WHAT'S THE PROBLEM?

- A. The first problem identified was that Ben had no tracking. He couldn't tell me if radio was yielding any results. Why keep spending money on marketing that isn't working?
- B. Ben couldn't tell if leads and phone calls were being handled in a timely manner. Were his installers really providing the best service? His reviews say they are but could it be better?

## SOLUTION

1. Ben needed a simple lead capture solution to first capture all of his leads into one system no matter if they were internet leads, phone calls, or referrals.
2. He needed to be able to route leads to himself, installers, and ensure they were following up on each lead. He has no idea if each lead was called 1 time or 6 times.
3. He needed to be able to nurture leads that weren't ready to buy today with follow up email.
4. He needed a simple system that would tell him how each lead source was performing so he could make better decisions about which ones to keep.
5. He needed a solution that could work for 1-2 salespeople or more if his company decided to hire more.



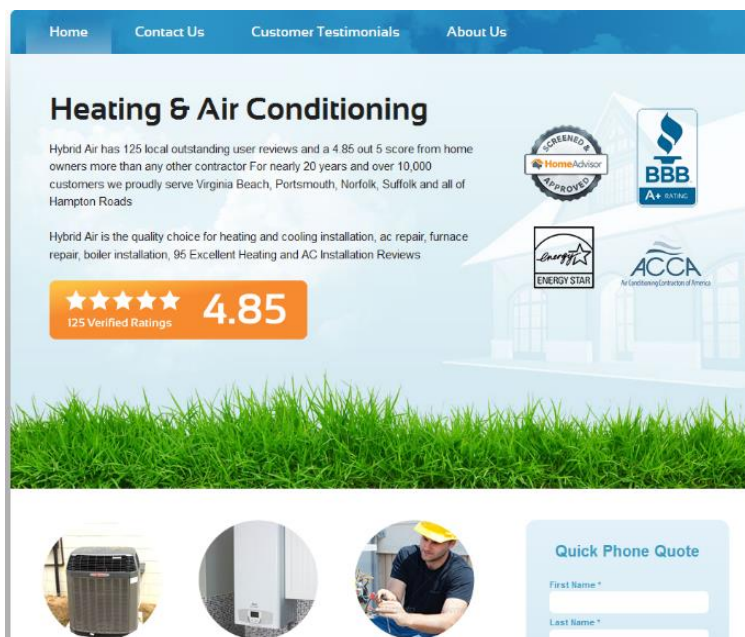
## HERE ARE THE STEPS TO CREATE TRACKING

1. **Create unique telephone numbers** for newspaper, Angies List, Money Clip. You can do this with call tracking but you really want a solution that can handle call tracking as well as internet leads. There are several providers like: ClickPoint, Leads360, InsideSales that offer these services. Obviously, he chose ClickPoint.

*(This took less than a day)*

2. **Create a basic landing page** - Use this for capturing all leads generated by CPC or cost per click advertising like Google and Yahoo so you can really see if CPC is working and how it needs to be improved. Here is his basic landing page: [www.cleanairvb.com](http://www.cleanairvb.com)

*(This took about 3 days to create and deploy)*



- a) You need variations for A/B testing and you might want to change the message depending on the time of year or specials you are running. Each variation needs its own tracking number so you can see which marketing channels and sources are working or you can set the form up to pass values into your lead management solution. At ClickPoint we identify the lead source (landing page) then the marketing partner (Google). The values are passed based off of just one variation of your landing page. You still need to test various forms and we have heard good things about Optimizely ([www.optimizely.com](http://www.optimizely.com)).
3. **Integrate website** - Get all leads and phone calls captured and route instantly to team. Ensure that every potential lead is accounted for and followed up on. To do this you need to integrate all of your forms on your website and you need to create a phone number for call tracking that will route to your team via your lead management solution.

## HERE ARE THE STEPS TO CREATE BETTER LEAD MANAGEMENT FOR FIELD SALES

### 1. *Deploy simple system for scheduling sales and repair appointments*

At ClickPoint we created a simple form similar to what we use with call centers so that scheduling coordinators can focus on other things. We don't require they understand how to use an entire lead management solution. All we want them to do is log any walk-ins, phone calls from an un-tracked number, or referral business. We also want them to schedule appointments for installation team members and update the sales information.

(We trained his scheduling coordinator in 1 hour)

### 2. *Distribute leads and phone calls to salespeople*

Deliver leads to installers based on any set of rules like skill, round-robin, etc. give them a solution to use with iPhone or any smart phone since 90% of the time they are in the field. If you are working with an inside sales team you want to use a solution that is easy to use and gets your team off the ground fast.

We instituted Pull distribution which is what we recommend about 70% of the time. Why? Pull cuts out the problem of delivering leads to people that are on a call, on an appointment, on vacation, sick, etc. It also encourages team members that are hungry to get more leads. There have been white papers that claim as high as 300% increase in performance related to switching from push to pull. While it varies by vertical we have seen big results from small companies all the way up to large.

## HERE ARE THE STEPS FOR CREATING MORE LEADS

### 1. *Create listings with sites like Yelp, Super Pages, YP, and more*

These type of listing are not only good for reviews and exposure they are also valuable one way links to help boost natural ranking. If you are not sure about these listings you can go to [www.getlisted.org](http://www.getlisted.org) a company owned by SEOMoz. It will quickly tell you what public listing sites you are on and which ones you are not showing up on.

### 2. *Find new lead sources for HVAC in a local region*

This can get difficult but we did find a few new partners, however, no many that could provide comparable volume to Home Advisor.

In Field Service the following companies offer Cost per Lead Campaigns

- a. *Home Advisor* – Our top pick by a mile
- b. Best lead quality, best review portal (easier to get more reviews), best pricing
- c. *Networx* – Ok pick if you need additional volume

- d. *DoneRight* – LendingTree company, has potential but is limited to major markets
- e. *CalFinder* – Ok pick for additional volume

For Advertising with a general advertising cost we are still trying to determine if SuperPages has value. We know Angies List has value for major markets but it is still to be determined for mid-size markets like Hampton Roads.

Depending on what business vertical you are in we have results regarding lead providers. We work with over 200 lead generation companies across many different industry types.

### **3. Create SEO friendly site and increase natural links**

Ranking naturally using natural linking, site optimization, and if your site is already doing well we bring in the heavy hitters from Elixir Interactive ([www.elixirinteractive.com](http://www.elixirinteractive.com)). Elixir founders created Sycara, an SEO optimization software and they have proven themselves time and time again with amazing results. If you have the budget you really should consider this to be one of your top priorities. We get about 50% of our leads from SEO and they tend to be the strongest of all of our sources. Expect to pay around \$2,000 a month or more to get started but then the fees subside depending on what you are trying to accomplish.

### **4. Blog about** your adventures with a WordPress blog.

### **5. Social Media.**

I know you're a small company and don't have time to write blog articles. Trust me I get it, I have hard time myself. So create all of these pages because you need the link value and then consolidate them under [www.RebelMouse.com](http://www.RebelMouse.com) so that you only have to make one update. This will save you time. All you really need to do is make sure your customers know you have a pulse. If you are a bigger company you have a team to help you and this is part of the job function. In field sales it's almost impossible with owners working out of their trucks. In inside sales management can rotate creating relevant articles and white papers.

- a. Create a Facebook Page
- b. Create LinkedIn
- c. Create Google+ and update Google Places
- d. Intertwine all of these with RebelMouse ([www.rebelmouse.com](http://www.rebelmouse.com))

## **LEVERAGE EXISTING CUSTOMER LIST**

One of the first things we did with Hybrid Air was to send out a thank you and a newsletter that had information about keeping your ac system running all summer long. We asked current customers to



respond back if they were interested and the results were pretty big. You have a wealth of opportunity in your existing list of customers. Make sure you get their email address when you service them!

**Note:** If you are a larger company your requirements are much more extensive, but don't worry. We like to keep things simple. In the case of a call center or sales team with 20+ sales agents, you are going to need to assess things like optimal lead distribution. I would suggest you download these three white papers for free:

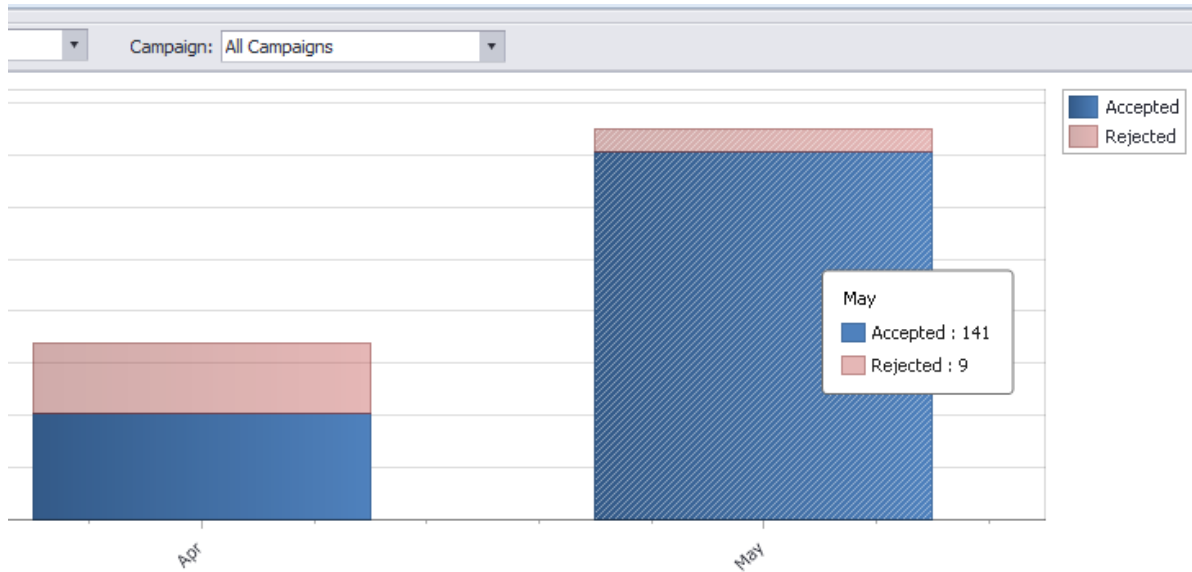
1. Increase your ROI by 20% or more from leads using Pull Lead Management  
[Download Whitepaper →](#)
2. Lead Nurturing will increase your sales by marketing to 80% of leads not sales ready  
[Download Whitepaper →](#)
3. Push notifications, along with email nurture, and pull lead management will triple your sales  
[Download Whitepaper →](#)

## RESULTS

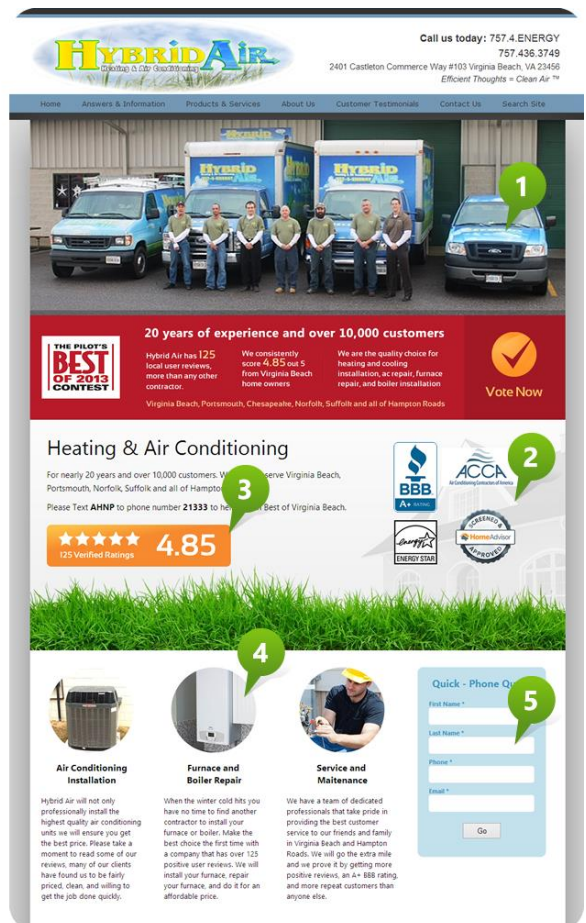
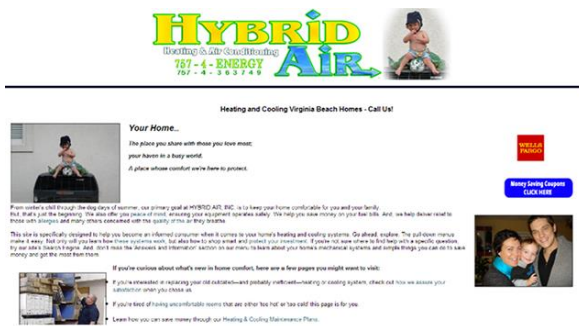
1. Now Ben can see which leads are closing, which ones aren't, and he can make changes really fast if he needs to.
2. They can see that some marketing campaigns were absolutely not working and we moved that money into ones that were.
3. In the first month Ben noticed his best results were coming from spending money on Home Advisor and Angies List, Networkx, and Google CPC, however he also had a low cost per closed deal from Google advertising and he noticed more leads from natural search.
4. We urged Ben to improve his website so that he converted more of his visitors. Once he completed the website changes we monitored results with his new system.
5. Total new leads and increase in lead production
  - a. Month 1 – 18% increase in total leads created
  - b. Month 2 – 72% increase in total leads created over the previous month
  - c. 36% increase over the previous year for the same range

Leads created increased by 72% from April 2013 to May 2013. Heating and Cooling is seasonal and it does pick up in May so the best way to tell what is going on here is to compare lead production over the previous year. May 1-31 2012 there were 91 total leads vs. 141 total leads generated in May with a couple of days left in the month. That's still a 36% uptick in new leads over the previous year. Nothing had changed except the efforts and tools we deployed in mid-April of 2013 to improve tracking, CPC, and SEO.

## NEW LEADS IN MAY UP 72%



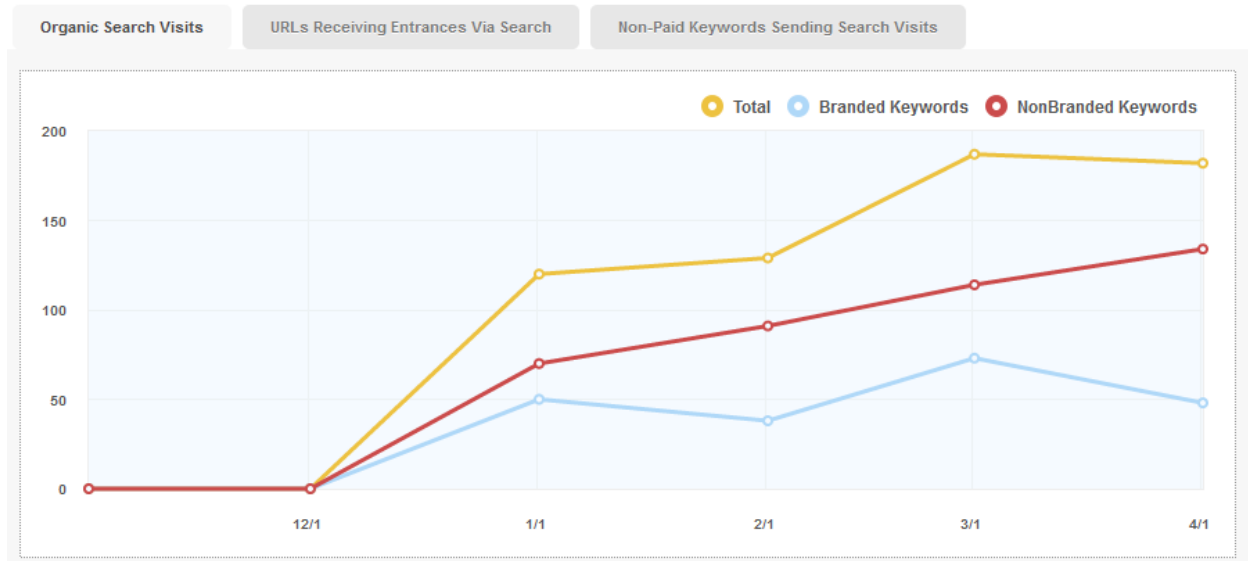
## WEBSITE IMPROVEMENTS



1. Added Team Pic to show the company presence
2. Added awards, associations
3. Added customer reviews
4. Added specific offerings
5. Redesigned with call to action
6. Redesigned with search placement and keywords in mind

New Site – Keep in mind we still had to use his old CMS and hosting provider that he was under contract with. Considering the CMS was built in the 90's, I think we did fairly well.

## ORGANIC TRAFFIC INCREASE



What does this mean to Ben's total revenue? It has nearly doubled in the first few months. He has total control over his sales team, install team, and marketing sources. He relies on his lead distribution software to help him manage this process and he focuses on what he does best, selling.

### SMALL ACCOUNT INVESTMENT

Implement lead management solution to capture, route, and monitor lead performance

Investment: \$2,000

Monthly fee for lead management solution \$375

Other services provided:

New website improvements

Investment: \$1,500

Focus on natural search yielded 233 more clicks to [www.hybridairusa.com](http://www.hybridairusa.com)

Investment: \$3,000

**Note:** If you are a larger company your requirements are much more extensive but don't worry. We like to keep things simple. In the case of a call center or sales team with 20+ sales agents you are going to need to assess things like optimal lead distribution. I would suggest you download these three white papers for free:

1. Increase your ROI by 20% or more from leads using Pull Lead Management
2. Lead Nurturing will increase your sales by marketing to 80% of leads not sales ready
3. Push notifications, along with email nurture, and pull lead management will triple your sales

# B2B Lead Generation

Let me start by saying B2B lead generation is much more difficult than B2C. Why is B2B so challenging? Well, if you think about it, your target market is getting approached daily by every hosting company, every search optimization firm, and they are people who are generally very busy. In order for you to be successful, it's not about numbers and mass marketing; it's about target marketing where generally you have to offer something of value to even get the first phone call. You have no doubt noticed that most lead generation is focused on offering things like white papers, industry news, and other valuable information in return for a prospects information. I will use the ClickPoint lead generation campaign as an example, it's specifically relevant because you decided to give it a read. You are reading our lead distribution buyer guide, which we designed to specifically create value for our potential customers; in return we get your attention for a moment and you can decide if our services are of value to your organization. If we didn't include relevant information and only tried to sell you, then you probably wouldn't have made it to this part of the document. This type of landing page, with offered content, is widely used by B2B companies. The value of relevant content cannot be overstated.

## STRATEGY FOR CREATING LEADS IN B2B VERTICALS

Ultimately you want to create leads, track them, and ensure you are getting an optimal conversion rate or Cost per Acquisition (CPA) on the leads you are creating. Your main goal should be to implement a solution that shows you what your CPA is and how each of these components is performing for you.

### 1. ***Provide value, be a thought leader***

*\*Tough to put a measurement on this but it's worth stating*

In order to be successful with B2B lead generation you need to be credible, which means your success will depend greatly on what others say about you. You need wins with customers of note and you need to service them so well that they give you great testimonials. You need to feature these testimonials on your website and landing pages. Additionally, if you can get reviews on a site like [www.capterra.com](http://www.capterra.com) or similar it helps a ton.

The following sites for technology offer reviews:

- a) *BBB* – Very Credible and almost a must for any business
- b) *Capterra* – Cost per click
- c) *Comparz* – Free
- d) *Find the Best* - Free
- e) *Software Advice* – Pay per lead model

**Tip:** If you are on a budget you can also use this service to claim your business and find all of the business listing sites that are available [www.getlisted.org](http://www.getlisted.org)

This site will show you all of the available business listing sites; mostly they are free of charge. Almost all of them feature reviews that you can solicit from your customers. Additionally Google+ allows you to get reviews and then will feature them on Google Maps and search as part of your Google Places listing.

## 2. Create multiple landing pages to test results

Before you get started make sure you have something valuable to offer. Take your time on this and create a landing page that is simple and to the point. Use the 7 principles of conversion centered design (CCD) provided by Unbounce.

Before you get started on your landing page or website read: <http://unbounce.com/landing-page-examples/36-landing-page-designs-critiqued-for-conversion/>

The screenshot shows a landing page for LeadExec, a lead generation software. The page features a header with the company logo and a phone number. A main section offers a 'FREE Lead Distribution Buyer's Guide' with a list of benefits and a contact form. Below this, there are testimonials from Steinway & Sons and LeadsCon, and a section for LeadsCouncil. The page is annotated with five numbered callouts: 1 points to the phone number, 2 to the 'FREE' badge, 3 to the list of benefits, 4 to the contact form, and 5 to the testimonials.

1. Track all calls with an IVR phone number
2. Offer something of value
3. Quickly state what you are providing
4. Keep a the request for information simple
5. Show credibility
6. Use the recommended style and layout suggestions from the Unbounce blog article

## 3. Make sure you are blogging about relevant topics

Running effective B2B social media is very hard to do when you have 5 different social media accounts. I will be the first to admit it's tough if you are a small company and don't have someone dedicated to this task full-time. One way to keep up with the social media craziness is to use just one

service that scrapes your posts; which can tie them all together so that you only have to make one update. In addition it looks really good aesthetically and your customers can find all of your info here, including any YouTube videos. I learned the lesson early on to have a little fun and don't be so cold; show some personality. Take a pic of an office outing or one of your team members having fun. Nobody wants to work with a company with no personality.



**Tip:** I strongly recommend using <http://www.rebellmouse.com> to consolidate your FB, Twitter, and Google+.

#### 4. Awards and accreditation are paramount

We are members of the Leads Council, BBB for over 5 years with an A+ rating, and have won recent industry awards. This is not easy, but aligning yourself with associations is a must. Every industry has them and they are the first place you should seek entrance into.

#### 5. Offer a trial of your software or service

Guess what? My 2 year-old uses an iPad like it's wired into her DNA. At ClickPoint we have had to learn as fast as possible that the expectation on software, service, and really anything one purchases these days, is instant and demanding. Customers want software to work instantly, they don't want products to just work; they want services to be simple and to the point. Nobody has time or the attention span for anything that isn't instant. Nobody will buy whatever it is you are selling without a trial, or at the very least videos or a slide show. I hate sites that con me into submitting information only to find out there is no reward!

**Tip:** If you build software, read "Getting Real" by 37 Signals and then their follow up, "Rework." Actually, even if you don't build software you should read it because it speaks to start ups and business to business companies and how they should approach hiring, building, and creating something of value.

**Read:** "Getting Real" by 37 Signals – The smarter, faster, easier way to build a successful web application.

## **6. No long term contracts**

Unless you are IBM you don't really need to require long-term contracts. They are scary to most customers and if you provide great service why would you ever need one? Maybe I am speaking to start ups here, but offering a month to month agreement is always a great way to increase trust and show the world you are confident your product and service is the best.

## **7. Focus on service**

Our best customers have not come from Google CPC, a banner, or some marketing campaign. Our best customers, several of whom are fortune 500, came by way of customer referral. Focus on your product first, get people to love it, and then let them bring you their friends and business acquaintances. If you need more information on providing the best possible service read:

- a. Delivering Happiness: A Path to Profits, Passion, and Purpose
- b. Tony Hsieh writes one of the best books you will find on successful corporate culture and customer service. This book has helped shape part of the ClickPoint culture and helped us put service first. A great read for any company looking to put service and culture before profits.
- c. Exceptional Service, Exceptional Profit

Micah Solomon reveals all the secrets to creating a customer first organization. This book is packed with examples of how amazing service should be the cornerstone of your business. You will find example after example of the most successful companies using the same methods to provide anticipatory service. Learn how to get buy-in from your team and create a name for your business simply by providing the best possible customer service.

## **8. Create a sales development position**

This is really a crucial position for B2B companies. The theory is that your best sales people should not spend time cold calling, but rather working with a sales development representative that focuses on creating opportunities for them. This means that their day is spent providing value rather than pounding the phone. This

**Read:** Predictable Revenue

Predictable Revenue by Aaron Ross is packed with information on how to successfully create a sales development position and harness the power of utilizing your sales team strengths while minimizing their weaknesses.

## 9. Nurture Nurture Nurture!

In B2B, just because someone says they are ready to buy doesn't mean their boss is. Many times you are dealing with multiple decision makers and the client is hardly ever a one call close. Generally, we see about 20-25% of leads that are ready to buy now and the other 80% need to be nurtured. Nurturing is pretty simple; create helpful, relevant information to be delivered via email, direct mail, and give the prospect a reason to stay engaged. You can use marketing automation software to get even more dialed in by seeing when that potential customer comes back to your website. Generally, you want to ensure your customer doesn't forget about you when the company comes back around and is ready to buy. Email nurture is a staple feature for almost all lead management, CRM, and marketing automation solutions. Use it!



## 10. Track and monitor everything

Just like B2C, you have to track every phone call and every Internet lead that is generated and what happened with that lead so you can calculate cost per acquisition. What is it costing you to create a lead with marketing source X vs. Y? If you are only tracking phone and not Internet leads or vice versa, can you really tell which source is working? The best way to do this is to segment your marketing efforts and ensure that you have phone and Internet lead tracking in place. One solution that will capture all internet leads and phone calls can tell you exactly what your Cost per Acquisition (CPA) is by lead source or a marketing campaign.

## 11. Invest in SEO

SEO is expensive and there are many companies that are not legitimate. We work exclusively with Elixir Interactive. I know I am making a pitch here, but we were burned 3 times using SEO firms that told us exactly what we wanted to hear and then not only didn't perform, but our business was actually hurt by using toxic links. The problem with SEO firms is that while they may know how to tweak your website to fit within Google's most recent algorithm, many of them do not have or employ reputable linking strategies. This is something that is so important you really should also subscribe to

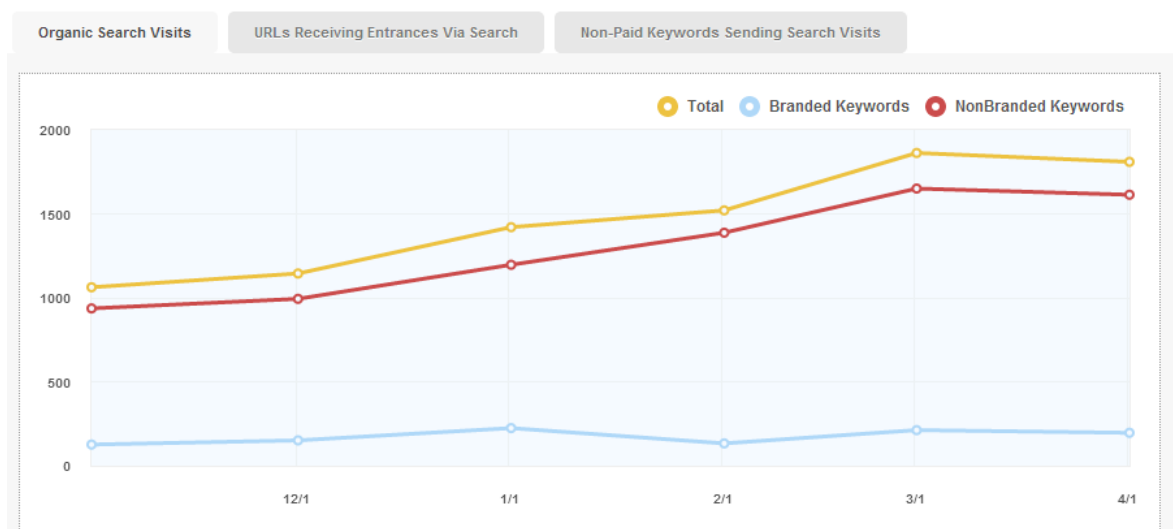


Moz ([www.moz.com](http://www.moz.com)) so you can understand the basics of search optimization. This solution will help you verify that your SEO firm is really doing what they say. Be prepared to spend at least \$2,000 a month for a reputable firm. If anyone promises results for anything less, they are not being truthful.

## RESULTS

There is a lot of work to successfully roll out a B2B lead generation campaign, so I will focus on individual results by category.

1. **Landing Pages** – Using the described methods above along with sites like Capterra, Find the Best, and CPC using Yahoo and Google, we were able to increase total monthly lead count by about 15% a month.
2. **SEO** – By using a reputable firm we increased our organic traffic from Google by as much as 60%. See below chart from engagement to 4 months after engagement:



3. **Sales Development Rep** – Utilizing a sales development representative we had a slight increase in sales conversion. Most importantly we were able to ensure all leads were responded to quickly, followed up, and nurtured.
4. **Nurturing Leads** – This is critical and something that is more of a phase II focus. Your initial focus should be to get leads captured and track all lead sources. You need to fill the funnel first, then nurture it once it's filled. Once you have filled the funnel, relevant content will need to be created for different customer profiles.
5. **Newsletters** – Newsletters are a great way to keep your message and brand in front of your existing customers. It's also a great way to create leads. We have created many valuable leads by our current customers forwarding our newsletter to other contacts they think might be a fit for our software.

# Pick a Partner

- Questions You Should Ask a Lead Distribution Provider
- Top Mistakes Made in Choosing a Solution
- Tips for setting up Lead Sources and Integrations

## Questions You Should Ask a Lead Distribution Provider

Remember that when you pick a software solution you really need to be thinking about a long term partner. They must be there for you when you need it to help you integrate lead sources, provide tips, and answer your questions. They really should be more of a consultant that is invested in your success not just a tier 1 support person on the other end of the phone.

### ***Which ways do you deliver leads?***

In the past 5 years working with corporate clients and lead generation companies, we have found that they all come across changing requirements monthly. HTTP Post, XML, Get, SOAP, Text SMS, E-Mail and Ping and Post are all required to be able to interface with other software solutions or send leads to field agents.

### ***How do you make it easy to create campaigns and lead sources?***

If you can't set up a lead source with posting instructions in minutes, not hours, there is a big problem. Make them show you how they do it.

### ***Do lead sources have a way to see what their payout and performance is?***

How can you manage lead sources if they don't have a way to filter bad leads, see if a post isn't working, or see what their payout is? If they don't have access to this information they will call you and slow you down.

***Do you provide lead scoring?***

While this isn't the definitive solution, you should have something in place to prevent fraud. This should include profanity, dupe check, real-time IP validation, address and phone verification. We provide a way to call verify your leads.

***Do you have the ability to deliver leads automatically based on percentage, skill, location (zip, state, or sortation for Canadian delivery, and postal code)?***

It's pretty easy to understand that without these types of delivery you don't have much of a lead distribution solution.

***Can you deliver leads based on any lead field that you currently collect ( i.e. age, home loan, loan type, health, sex, automotive type)?***

This is called criteria, and your solution should be dynamic; meaning no matter what fields you collect on your website or landing page, they can be used as lead delivery logic.

***Do you have a disaster recovery plan, BCP plan, and reliability plan?***

What happens if the company holding all of your data goes under? Are they a division of a public company?

***Who are your current customers and what do they have to say about you?***

I would ask for at least two references from large companies.

***How long have you been in business?***

If it is less than 3 years, you could have a problem. You have no idea if the owner's intention is to sell of the company to another.

***How do you measure success with your clients?***

Success is measured by ROI. A provider should look at process improvement, lead sales, reduced contact time on leads, increased profit by eliminating bad lead sources, and improved relationships with lead sources. All of these factors are used to determine success.

***What is your customer support like?***

For this type of solution you should have a dedicated support representative assigned to your account. It doesn't matter how big or small the problems are, you will want to have a familiar face handling requests, and more importantly someone who understands your account configuration.

***Can you provide custom software development for integrations?***

There will come a time, no matter how big or small your company is, that you will need a customization not offered by the current solution. In the past 6 years we have had requests for thousands of

integrations and custom solutions. While we can't do them all, we do offer a paid service for the ones that really matter.

## Top Mistakes Made in Choosing a Solution

### **A. *Going for a cheaper alternative***

Once you go down the path of integrations, it's difficult to change course. You should feel 100% confident that your provider will be there to help you every step of the way. Dedicated support is a huge part of making a lead distribution program successful. If your provider doesn't offer it then you really need to have someone on your internal team that is very technical and can handle highly complex problems.

### **B. *Expecting it to just work***

We provide a good deal of wizard-based steps to help make the process of setting up lead integrations easier. It will still take a good amount of work, either on your own or by handing it off to a dedicated support representative.

### **C. *Not assigning a white knight***

White Knights are essential to a large-scale deployment. You need to have someone on your internal team that will be the main point of contact, the main product champion, and the one who works with the software provider to ensure the software is being used to its potential.

## Tips for setting up Lead Sources and Integrations

### **A. *Preparation***

Thinking ahead will definitely help you to get your lead source and integration completed quickly.

Collecting this information beforehand will ensure that when the time comes to set up the lead source or integration, you will be prepared.

This information can include:

- a) Pricing per lead
- b) The incoming criteria you will be setting up for the Lead Source (City, State, Loan Amount, Etc.)
- c) Any kind of validation you will be using for this specific lead source

- d) Duplicate check – how many days (30, 60, 90, 300)
- e) Address or phone verification
- f) Call verification (what constitutes a good lead?)

## **B. Double Check**

Before implementing your integration from your site or asking your Lead Source to move forward with theirs, double check everything.

- 1) Look through your Posting Documentation and ensure that everything is correct. This will ensure that no mistakes were made during the Lead Type Set-up.
- 2) Look through the campaign set-up for the Lead Source. Check the pricing settings, the criteria, and the lead type information. Double-checking this will make sure that no pricing issues appear in the system when live leads are hitting the information.
- 3) Double-check to whom you are sending documentation. This is critical so that leads are not coming into the wrong campaign; this will cause issues with reporting and ultimately force you to regenerate documentation and re-implement the integrations.

## **C. Send Everything**

When you send your Lead Source your posting instructions, make sure to include a brief summary of everything you discussed.

This should include:

1. Your pricing arrangements
2. Your Incoming criteria
3. Posting documentation
4. This will give you and your Lead Source all of the information required to set up the integration as well as provide a starting point for an email chain through the process.

# About Us

## WHAT WE DO

ClickPoint is a small team of determined individuals who wanted to change the way sales teams and marketers work with leads. Leads are more valuable to a business than ever before and how those leads are managed, tracked, routed, and scored, not only deserves more attention from marketing teams it demands automated tools that are simple and easy to use. We take an approach that looks at the entire process from lead creation, lead delivery, all the way to lead nurture and we help our clients simplify this process so that marketing departments can focus on creating more leads rather than complex lead management and delivery processes. If you have ever tried to get a lead program off the ground it can be a daunting process and we take great pride in making that process easier for our clients.

## OUR MISSION

To help companies grow by optimizing lead generation activities.

## OUR PRODUCTS

**Lead Distribution solution** is a tool for optimizing major lead generation operations and for distributing leads outside an internal lead generation system. When a lead (internet or phone generated, online or offline) enters Lead Distribution solution it will be “pushed out” (in real-time) to whomever is deemed appropriate by a pre-determined set of rules.

Automating this process is pretty powerful for large prospecting campaigns where it is normal for companies receiving hundreds or thousands of leads/responses per day. There is no way companies can respond to large-scale lead volumes credibly without automation. B2C companies in financial service, field service, solar, as well as lead generation companies and marketing agencies implement Lead Distribution solution for delivering appropriate leads to partners, call centers, sales teams, and clients to ensure quality follow-up and to maximize chances of conversion. Additionally, Lead Distribution solution scores leads, appends more detailed information to leads, call verifies leads, and uses tools to ensure lead quality is maintained as your lead generation program expands.

**SalesExec** is for managing leads internally with a call center or sales team. Employees retrieve leads utilizing both either a “push or pull-based” process. When a lead enters SalesExec, it will route to the person (in real-time) suited best for that type of lead. Employees enter actions and notes as they work an internet lead or in-bound phone call and quickly move from lead to lead to ensure optimal contact ratio. Management has total control over the actions, sales workflow, and recording of activities against leads. SalesExec is best used on sales teams of 3 or more to utilize the lead prioritization engine, lead nurturing tools, and telephony features such as click-to-dial, and power dialing.