Inbound Lead Qualification

with Sweet Sales Optimization

Ingredients:

- 1 lead scoring model
- 1 sales-driven follow-up email
- Robust marketing automation
- Tight CRM integration
- 2 pieces of compelling marketing content
- 1 cup of Sales and Marketing alignment
- 2 emails to deliver marketing content (sales or marketing driven)

Optional:

- 1 stick of dynamic content
- 1 landing page

SUMMARY:

Do you have plenty of inbound leads flowing in from your website? Are your SEO, PPC, and thought leadership initiatives paying off in droves? If so, congratulations—you've solved one of the number one challenges marketers face. However, filling the top of the funnel is only part of the equation. To get the most out of your demand generation efforts, you need a process for handling all those incoming leads. Use this tantalizing recipe to identify sales qualified leads (SQLs) and route them to sales, while nurturing non-qualified leads to move them to the next phase in their buying process and increase their sales-readiness.

Directions

1. **The secret to this recipe is your lead scoring model,** which enables you to rank the quality of leads based on how well they fit your ideal lead profile. Working with your sales team, identify key criteria (demographic and behavior) that denote a SQL. Do they have timeline, budget and authority? Have they taken a call-to-action that indicates interest in your product? Using the criteria, build a lead scoring model assigning a numeric value to the demographic and behavioral information you are able to capture with your marketing automation solution. Agree with your sales team on what numeric value indicates a lead is a SQL. Every lead with a score below that value should be considered a non-qualified lead.

2. **Using your marketing automation platform set up a two-track system.** The lead scoring model discussed in Step 1 will be the criteria used to assign leads to the appropriate track. Track 1 will be a process to manage SQLs. Track 2 is a process to nurture non-qualified sales leads.

3. **Configure Track 1 as a simple process for leads equal to or above the SQL score.** Set your marketing automation platform to schedule a task for the sales rep to follow up with SQL leads. Next, set the system to send a sales-driven email follow-up to the prospect. The email should thank the prospect for their interest and notify them that a sales rep will be contacting them shortly. Track 1 is now complete. It is up to

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Directions (continued)

the sales rep to continue the nurture process with scheduled live touches during the prospect's buying cycle. To support them throughout the sales process, Sales can drop the lead into a sales-driven lead nurturing program (See Recipe 4 in this Cookbook) after they've made contact with the prospect and are actively working it.

4. **To configure Track 2 identify two compelling pieces of thought leadership content** that you believe early stage non-SQL leads will find valuable. Pieces that help prospects learn more about the problem they're trying to solve and offer solutions for it are ideal.

5. **Create two emails that correspond to the content you've chosen in Step 4.** Depending on your sales process, you can choose to either make these emails appear to be directly from a sales rep or position them as marketing-driven. If your email is delivered as a direct message from a sales rep, remember to keep the email simple and conversational—this is the beginning of the lead and sales rep's relationship.

6. **If the leads in Track 2 take the desired call-to-action, configure your lead nurturing process to increase their lead score.** At that point, they will become an SQL, be removed from Track 2 and sent to Track 1 for sales engagement. See Figure 2:1 for configuration.

7. **For leads in Track 2 that do not become SQLs,** set your marketing automation system to send them into a long-term lead nurturing process (see Recipe 3 in this Cookbook) to continue the dialog with your company.

Timing

1. For Track 1, the follow-up email should be sent immediately after the lead registers on a landing page. Depending on the nature of the inquiry on your website and your process, set a timeframe for your sales reps to follow up. If possible, it should not be more than 3 business days from the date the SQL registered on a landing page.

2. For Track 2, emails should fall about 5–7 business days apart. If no action is taken, leads should enter the long-term nurture and follow the corresponding timeline.

Additional Options

Once you've nailed steps 1–7, consider adding these steps to spice up your recipe.

1. Instead of delivering the same email content to all prospects, harness the power of dynamic content to deliver content that is more relevant to the recipient. For example, if the lead is in the Financial Services industry, configure the dynamic content to deliver content that would specifically address issues related to that industry.

2. For Track 2, consider gating one of your content pieces with a landing page. Pre-populate the information you have already captured from the prospect and ask an additional question to further qualify the prospect and enable your sales team to be more effective. For example, you could ask a prospect to identify their number one pain point related to your product.

EXPERT CHEF'S TIP

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To spice up your inbound lead recipe:

Personalize the experience: It's very important to blend human touch points into this lead nurturing process. A personal phone call to the right person that is free of sales hype is the best way to build relationships that lead to positive sales results. You can make their experience more personal based on your insights and their level of engagement.

Keep the courses moving: Buyers don't want to be sold too anymore—they want to move themselves through the buying process. However, that doesn't mean that Marketing and Sales don't play a critical role in moving them through the buying phases. Nurturing and education all work towards the same goal—to eventually engage the prospect in a conversation.

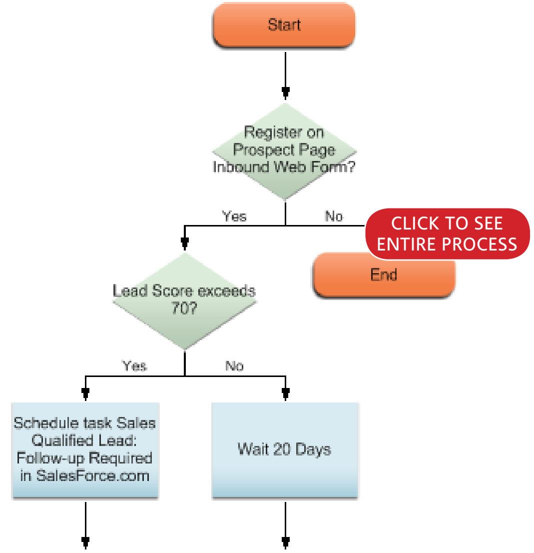

FIGURE 2:1