



Lead Management Best Practices Guide



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A Letter from the CEO

The Leader in Unified Channel Management



Dear Channel Professional:

Thank you for downloading this new guide to lead management best practices. We at ZINFI have been privileged to work for a number of major Fortune 1000 companies worldwide over the past decade, and we are proud of the work we've done to drive their channel programs globally. In the process of doing that work and conducting ongoing discussions with customers to understand their evolving requirements and serve them better, we have learned a lot about what works in lead management and what doesn't. This booklet is a summary of those lessons learned, with a particular focus on lead management in a channel sales environment.

Lead management in today's digital marketplace presents marketing professionals with a bewildering array of tactics and strategies to consider: content marketing, inbound marketing, social media, email templates, telespecting methods, conversion tactics, lead scoring, lead-nurturing phases and so on. This booklet covers all of these topics and more. It also offers in-depth discussions of lead management in the specific context of channel sales, and explains the important role that marketing automation plays in managing leads efficiently, increasing conversion rates and maximizing the ROI of your channel programs on a global scale.

Whether you read this guidebook from start to finish, or skip around and focus on the topics that are most relevant to you now, we hope you will walk away with new ideas and practical advice that you can start implementing today to make a sustainable difference in your organization.

As always, if you need help, have any questions or need more information, please don't hesitate to contact us at any time.

Sincerely,

Sugata Sanyal

CEO and founder of ZINFI Technologies



How This Book Is Organized

This booklet is divided into four sections. Sections I and II provide an introduction to and an overview of the lead management process.

Section III is focused on the best practices for selecting and implementing a successful lead management automation platform and program. It discusses the many ways lead management automation can help channel sales.

Section IV is about the capabilities and services that ZINFI offers and how they can help you to build a high-performing channel worldwide.

The lessons and best practices in this booklet are based on years of intensive practice in the creation and deployment of sophisticated channel marketing automation systems, as well as ongoing discussions with our customers as we strive to understand their evolving challenges and requirements.

Whether you read each section and chapter in sequence or skip around as your particular interests dictate, we think there is a wealth of information here that even the most experienced channel sales professional can learn from.

Enjoy!



1 Five Stages of Lead Management

Lead management is one of the top marketing keywords that is searched on Google every day, which is a clear indication of the huge and growing amount of interest in the topic. Are we clear on what lead management means? Basically, lead management is an organized way of generating, distributing and managing contacts with potential prospects, and engaging with those prospects to identify or generate an opportunity for a sales team to pursue. Lead management is one of the most important business functions, bridging both marketing and sales, through a combination of people, process and automation.

Just like a fish out of water, a lead has a specific and limited lifetime. Once a lead has appeared, it needs to be nurtured, managed and closed systematically. A typical lead management system will allow an organization to manage five critical phases of the lead life cycle, as follows:

1. Lead Generation: Content marketing has displaced the old model of telemarketing to generate leads. Today's marketers know that buyers search online and, by the time they contact a vendor, they have a very clear idea about what they are

looking for. This is the precise point where the first step along the path of systematic lead management, using an integrated approach to lead generation, must be taken. Integrated tactics like social marketing, search marketing, email marketing, direct mail marketing, and online banner ads, are all critical methods of generating awareness and create a solid foundation for inbound marketing. If you combine inbound marketing with outbound telemarketing towards your installed base of existing customers and interested prospects, you can exponentially increase the effectiveness of your lead generation efforts.

2. Lead Distribution: With leads in the pipeline and interest from prospective buyers, the next key step in lead management is lead distribution. I can't emphasize how essential it is to have an automated mechanism for lead scoring and distribution. Not all leads are ready for sales contact, so either they need to be nurtured further (please see Point 3, below) before being handed to an inside or outside sales rep or, in the case of channel-based organization, must be distributed to the right channel partner. This is where a rule-based lead distribution engine comes in. Any state-of-the-art channel marketing automation platform should be able

to distribute a set of leads to a group of partners based on various criteria, such as partner type, partner location, partner competencies, or interested buyers' segment, e.g., SMB, mid market, enterprise, vertical or geography.

- 3. Lead Nurturing:** Another critical component of lead management is lead nurturing and scoring. A marketing automation platform should be able to automatically create a multi-touch engagement with a potential buyer based on their purchase behavior. A prospective buyer's online persona should be scored in a systematic way, and appropriate sales people (whether internal captive or external partner-based sales reps) should be alerted when a lead is ready for contact. This systematic approach towards lead nurturing is critical to drive sales efficiency, increase closure rate and build the reputation of an organization as a responsive provider in their marketplace.
- 4. Lead to Opportunity Creation:** Once a marketing-qualified lead has been converted to a sales-qualified lead, the next big step is to develop the opportunity. This is the moment for exact deployment and fit analysis. This is a critical sales step, and also an essential part of the lead management process. Most existing CRM systems provide an effective way of tracking and managing opportunities, but they aren't designed with the channel in mind. If you are selling through the channel, make sure that you use a Partner Relationship Management platform that can drive opportunity creation and management through the channel in a dynamic and distributed fashion.

5. Lead Management Analytics: Last but not least: the most important step in lead management is to integrate the marketing and sales processes seamlessly, via a dynamic analytical engine that allows you to see clearly how effective your marketing is, how well your messages are aligned across multiple market segments to drive better engagement and conversion, and the steps you need to take to improve the efficacy of your sales programs and campaigns.

At first sight this list may seem like too much to handle for an organization that hasn't yet implemented automated lead management processes. However, it is not that difficult if you deploy lead management systems in simple automated processes, step by step. The key is to select a marketing automation platform (for a direct sales organization) or a channel marketing automation platform (for an indirect sales organization) that allows you to roll the system out over a few quarters. Rome wasn't built in a day, and this definitely applies to your state-of-the-art lead management system. But by taking the first step towards automated lead management, and identifying a reliable automation vendor to partner with, you can not only increase your sales, but also substantially reduce your marketing and sales costs.

We would love to hear from you where you think your organization is and what challenges you have faced to either deploys or to plan a deployment of a state-of-the-art lead management process. Thank you for continuing the conversation!





2 Social Media Syndication - Amplify Your Brand & Generate Leads

The way we go to market to get our messages out to consumers has dramatically changed during the past five years. Social media syndication, in particular, has become a critical tool in getting messages heard by a large network of channel partners. Why the focus on social media? Because the business of marketing is no longer just a function of advertising and public relationship activities. Marketing has evolved into a discipline that integrates technology, processes and people to create and distribute messaging and managing reputation around the core brand promise.

Process and technologies are critical pieces of the puzzle, but with the advent of social media marketing, people (customers, employees, partners, industry watchers, etc.) have moved to the center of this new era of marketing. No longer is there a monologue that supports brand messaging. Instead, marketing it is very much dependent on public dialogue and conversations that dynamically determine the depth and breadth of the brand. And, when it comes to channel marketing automation, social media

syndication not only plays a critical role in creating and managing brand presence and promise, but also becomes a critical tool for lead generation via the channel.

Before we delve into how exactly an organization selling through the channel can leverage social media syndication, let's briefly discuss which components are most important and how they fit into the overall digital marketing puzzle.

As marketers today, we have embraced the fact, and acknowledged the supporting data, that the buying process has fundamentally changed. Gone are the days when a consumer or a business buyer waits for a sales rep to call or buys based on watching an advertisement in mainstream media or visiting a booth at a trade show. Buyers today – consumers or business – all go online to do their research on business issues and the vendors who can potentially help solve their problems. This online search process invariably brings the searcher to social sites such as LinkedIn, SlideShare or Twitter for B2B buying, and Facebook,

YouTube or Pinterest or other vertical social sites for consumer purchases. It follows that, if your organization does not have a presence in those media spaces, a significant opportunity to build awareness and engagement is lost.

Social media syndication has the capability to amplify your brand presence via your channel partner network.

Let's say your organization has a couple of thousand followers on various social media channels. This is a fairly average number for most business organizations selling to B2B buyers. Now, you are incredibly blessed if you have an indirect sales force, aka channel partners (affiliates, agents, value added resellers, system integrators, etc.), because the chances are that they also have at least a few hundred, if not a few thousand followers in their own social networks. So, if you are able to get your messages out to a few dozen partners, and tap into their communities, your reach has just achieved an exponential increase. A good social media syndication tool can enable any organization to reach very effectively into their partners' networks with relevant, interesting content.

Now let's talk about what you need in a good social media syndication tool. These are the five core capabilities to look for ...

“No longer is there a monologue that supports brand messaging. Instead, marketing it is very much dependent on public dialogue and conversations that dynamically determine the depth and breadth of the brand. When it comes to channel marketing automation, social media syndication not only plays a critical role in creating and managing brand presence and promise, but also becomes a critical tool for lead generation via the channel.”

- 1. Single panel to manage social media streams:** Your organization probably has multiple social media channels. Whichever social media tool you use – like Hootsuite or SproutSocial – you need a single console from which you can disseminate content to your individual social channels. Your social media syndication tool should allow you to do this seamlessly.
- 2. Managing distribution of content to your channel:** Not all company information streams targeted at end-users are relevant for your channel partners. You need either specifically created content that you know for sure that you can auto-stream to your audience, or you'll have to hand pick other items of general corporate content to feed into the channel distribution network. Again, your social media syndication tool must have the capability to enable deep levels of customization.
- 3. Distributing content by region and partner type:** This capability is not available in the majority of direct marketing social media management platforms. However, it is likely that, when you are marketing via the channel, your messaging for markets like China or Japan will be very different from what is appropriate for the US or UK. Messaging must also vary according to your partner type, so you will need to select a social media syndication platform that allows you to apply these criteria to your marketing activities.
- 4. Tracking impression metrics:** Once you have most of your channel connected to your social media syndication platform, you need to be able to roll up metrics at a worldwide level, and also to slice and dice the data effectively to understand what is working and what is not. You will very likely see deep variations from one country to another, and further differences in responses to your content according to partner type and, further, to their installed base.
- 5. Managing campaign ROI:** Last but not least, one of the most important functions of social media syndication is to allow your partners to keep their installed base informed of changes, improvements and special offers via social streaming. The end goal ultimately is to help the channel achieve new leads from existing customers and potential new prospects. Your social media syndication platform should be able to capture leads and track them in detail too.

It's easy to see why, in today's age of digital content marketing, your social media network matters. Crucially you can amplify your reach to your potential target base via a robust social media syndication platform that can tap into your partners' followers and get your messages out rapidly and in a focused way not only to build your brand value, but also to fill your pipeline. ZINFI's Partner Marketing Management (PMM) platform includes an integrated social media syndication capability that can enable you to reach your prospects and customers globally and locally with proven ROI techniques from social media marketing.



3 Inbound Marketing Insights To Win Over Your Target Audience

Wouldn't we all rather have customers willingly walk through our door instead of having to stand on the sidewalk and wave our arms for attention? Once upon a time, business had a solid advertising model to get an audience—you have a product, so you pay for print ads, billboards, television time and radio spots to get the word out. Commerce had to rely on well-placed advertisements to show up and be positioned where the target audience was. But now, in the Internet age, people are surfing in droves on the web. We know where they will be, and the savvy marketer can now get a very clear view of their searching and browsing behavior. So, instead of making a lot of noise with paid marketing and vying with your competitors for ad space (outbound marketing), you can carefully place attention-grabbing content in key online venues and—in very targeted ways—engage your audience, intrigue them and get them to come to you. Welcome to inbound marketing.

Let's be clear on the difference between these two approaches.

Outbound marketing requires outreach on the part of the marketer through concerted efforts such as paid and search engine marketing techniques. You find the customer and try to actively capture their attention. Inbound marketing is the opposite, wherein intelligently placed content (blogs, articles, syndicated content on sharing sites, social media posts, etc.) is distributed and made available for the public to find and digest, hopefully influencing their decision to come to you to find out more. Whereas outbound marketing is typically "live" only for a finite period through budgetary spending and rented digital space, inbound marketing content is perpetual and available for discovery without boundaries. Because of this key difference, it is important to make sure the everlasting content you put out there to drive people to you is of high quality, is relevant to your target audience and provides genuine thought leadership in your industry.

Let's take a look at some helpful questions to ask yourself as you

attempt to strengthen your inbound marketing strategy and gauge its effectiveness:

- 1. What are current trending topics?** Thought leadership is an important part of inbound marketing. People will gravitate towards your content and follow through to your website or offer if they recognize authority and influence in what you have to offer. Can they learn something? Can they benefit from what you offer? And why would they listen to you? The best way to be a thought leader is to put out relevant content on a regular basis that revolves around topical and trending discussions in your industry or space. Spend some time researching and thinking about the current topics of interest in your industry space, and then create assets that answer or speak to those discussions to distribute on sites like LinkedIn, SlideShare, YouTube and Facebook. Be timely, be relevant.
- 2. What are your competitors talking about?** Listening to what your audience is talking about is not enough. You also need to pay close attention to what your competitors are saying and what kind of buzz they are creating. Like you, they are probably distributing their own content on hot topics, but what if they're missing the mark? If your service or product does a better job of addressing a trending issue or pain point, then jump on it. Use your inbound marketing resources to enter the discussion and show you have a better solution, and do it in a way that ties back to your offerings. Instead of coming off as a veiled ad, your content should position your

offering as a more intelligent and beneficial approach to the specific problem or issue under discussion.

- 3. What are industry analysts and influencers blogging or commenting on?** Every industry has its share of analysts and influencers. Analysts (who make a living performing primary and secondary research on specific industries) and influencers (who have authority based on reputation and public acclaim) can be your best friends without even knowing it. Often the topics or theories being searched or discussed by your customers originate from commentary by analysts or influencers in your industry. Your inbound marketing content should align with these discussions. If you distribute quality, relevant content in a timely manner, your organization will be an integral part of these discussions and you'll be immersed in the latest buzz. Make sure to tag or credit these analysts or influencers when posting your content. This will make your inbound marketing efforts more readily found and searched, and align you with these authoritative figures—giving you more presence and driving better conversion to your site or offerings.
- 4. Is your content synchronized across channels for maximum effect?** Once you have discovered a compelling central theme or topic on which to base your next round of inbound marketing efforts, make sure to stick with it across all channels. You can create an article, blog post, video, eBook, slides and more—all around this one talking point—and then release it in one coordinated wave. This will help tie

INBOUND MARKETING STRATEGY



your thought leadership together across all your share sites and social media portals. If your audience encounters different versions of the same content on different channels, this will make you more recognizable. They are more likely to associate a specific advocacy or solution with you, and be more inclined to click through to your website

5. **Is your inbound marketing content relevant to pain points of real customers?** Every customer or enterprise has its own set of pain points and solutions it is desperately trying to remedy. These may be part of the trending discussions I have referred to above, or they might be pervasive throughout the industry, but not yet openly discussed. Try to get ahead of the game by listening to your leads, prospects and existing customers and segmenting out their common problems. Create thought leadership content around these issues and distribute the content through your inbound marketing.
6. **Inbound marketing is great for new leads, but what about your existing customers?** Inbound marketing is traditionally looked at as a technique for lead generation or bringing in new prospects. But can't an existing prospect be a NEW prospect in a different way? Your existing customers are already in your wheelhouse and are paying for some portion of your solution set, but it's likely you have other offerings they are not currently using. Consider targeting part of your inbound marketing efforts to this existing client base, emphasizing the relevance and benefits of a more comprehensive solution.
7. **Are you paying attention to the right performance metrics?** Everyone wants to know how many people are coming to their site and the conversion rates generated by specific links. That's great, but that's not the only metric that determines success in lead conversion. Your inbound marketing might create lots of buzz, with lots of people clicking on links in your social media, syndicated assets and messaging—but once they hit your site or landing page, what happens then? Look at your referral traffic (who is coming to your site from your syndicated content and social activity) and compare that to on-page drop, bounce or call-to-action (CTA) conversion. There's little benefit to driving loads of traffic to your site through inbound marketing if a majority of those people back out right away or don't convert the form or CTA you are offering. If they are coming and looking, but not taking action, you need to figure out why. Make sure to align what you offer and how it is presented with the content you put out there publicly, and pay attention to which referrers are driving the most traffic to you. Review the content you have on the top referring sites and align your landing page with that.

Inbound marketing is an effective and powerful tool if managed right, and it can be a sleeping giant—it doesn't go away once someone's budget expires. Be a good listener. If you pay close attention to trending topics, determine who is leading the discussion around them and what is being said, and establish the relevance of those topics to the solutions you have to offer, you're in a great position to create effective inbound marketing materials and content. Create it in an authoritative and coordinated way, distribute it through partners across various channels, and make sure your website destination page aligns nicely with what you have distributed.

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4

Skyrocket Your B2B Lead Generation Results with Amazing Content and Social Media

What is the most important part of your job as a B2B marketer or business development professional in the tech space today? Generating leads! They are the lifeblood of your business model and the food that feeds your revenue pipeline. It's a lot like a restaurant: Marketers get the public to take notice and walk through the front door, business development gets them to sit at the table and sales takes their order and serves them their dinner. But if the marketers can't find potential customers with an appetite, there will be no sales.

B2B lead generation is dependent on good digital marketing strategies. Inbound marketing has the staying power of unlimited presence and searchability on the web, whereas outbound marketing is usually time-restricted, expiring when the budgeted funds run out. That's why you need a good strategy that helps you find the best prospects. If done right, your digital marketing can net you targeted audiences and response to conversion. Here are some tips to follow

when deciding how to structure your B2B lead generation approaches:

Be a Social Media Wizard!

Social marketing can be a powerful tool, if done correctly and if platforms are chosen wisely....

1. **Choose an effective social platform.** Social media is a sea of potential. There have been many studies done in the B2B space about the effectiveness of social media in B2B lead generation. Some reports proclaim excellent lead conversion on sites like Facebook and Twitter, and some warn against the waste of advertising dollars on these platforms due to non-targeted click-throughs and inflated analytics. The overwhelming consensus is that social media is an excellent medium for outreach, generating much discussion and brand awareness—but very few actionable leads. Out of all



the social platforms, LinkedIn is far and away the best for B2B lead generation. It's the site where you should focus your digital marketing efforts. Although there is plenty of casual social chatter and personal posting bubbling up on LinkedIn these days, it has remained very focused on B2B connections and communications. The percentage of external non-business content represents only a small fraction of the cat pictures and infernal "I'm at Starbucks!" selfies on Twitter and Facebook. LinkedIn remains a viable source of genuine lead-generation potential. Two tips to using it correctly:

Be active. Once you establish a presence on LinkedIn (whether through your personal profile as a thought leader or through your company page) remain active and engaging. Post articles to Pulse, share articles written by others that you find relevant and can tie back to your own content, and comment on related postings and articles. Engage in conversation. Make sure you don't let several days or weeks go by without making some kind of a mark. Inconsistency will only cause you to be overshadowed and pushed down the page by those who post regular writings and commentary.

Join groups. The best, and quickest, way to find a target audience is to research and join discussion groups that are formed around central topics pertinent to the content you are creating and sharing. This puts you in a more intimate space of communication and engagement, and can be an excellent form of B2B lead generation by attracting interest from a) potential prospects or b)

influencers whose ear you might catch and who can help get you additional attention by commenting on your behalf.

2. **Allow newsletter signups via your social media presence.** Newsletters have always been an effective method of B2B lead generation, but finding engaged subscribers has been a bit of a struggle. Why add scraped contacts from database queries and add them "cold" to your newsletter distribution when you can have "warm" recipients actively opt in via social media registrations and collect leads that are ready to talk to you?
3. **Distribute video content as tech talks.** YouTube, with over 1 billion viewers, is a heavy hitter in video distribution, and many businesses have created channels of thought leadership video media to convert viewers to their websites. The problem is that the YouTube platform has become noisy—diluted by skateboarding antics and top ten lists of who is more famous than whom. I urge you to explore Vimeo (170 million viewers, a fifth of the audience of YouTube), which has a much higher percentage of business-minded viewers and more of a collaborative audience who view Vimeo as a thought leadership syndication platform. B2B lead generation is likely to be much more effective on Vimeo. The channel categories remain cleaner and content is more focused on in-depth tech talks and industry dialoguing.
4. **Funnel back to your website.** Of utmost importance in your B2B lead generation strategy is to remember

“ B2B lead generation is dependent on good digital marketing strategies. Inbound marketing has the staying power of unlimited presence and searchability on the web, whereas outbound marketing is usually time-restricted, expiring when the budgeted funds run out. That's why you need a good strategy that helps you find the best prospects. If done right, your digital marketing can net you targeted audiences and response to conversion. ”

that every bit of syndicate content you push out through any of these social channels and platforms must have links and references to drive people back to your website. The social media presence you create will not generate your leads alone, they will only stir up interest—it is your website that is the final destination to convert leads and be your best salesperson. Make sure that everything out there generates interest and funnels people back to the site as the great closer!

“Take” the Lead: Tips for Attractive Content Marketing

Properly presented content will be your best weapon in conquering the B2B lead generation castle by storm....

1. **Publish surveys and research reports.** EBooks are great, although many marketers are opting to call them “handbooks” or “guides” to avoid confusion with paid eBooks on sites like Amazon, and blog articles are informative and fantastic for SEO placement. However, nothing packs a value punch like putting out a survey or report. These are the best vehicles for thought leadership, as they are generated from facts-based data and actionable metrics rather than opinions or conjecture on the part of the author.
2. **Provide educational or resource-rich content.** Make sure all your content—whether blog articles, videos or PowerPoint decks via SlideShare—is positioned to speak on trending topics, pain points and issues relevant to your target industry. Instead of serving up diatribe, be educational and deliver solutions. The more value you add in becoming a resource in your content area, the more your B2B lead generation conduit will open up to prospects who see your product as a solution and want to review your site for more information.
3. **Stay visual when you can.** As great as eBooks, reports, white papers and the like are, and as informative as they can be, nothing captures attention like an effective visual. Why put out a dry white paper chock full of charts and percentages when you can create a fun infographic? Why include a lined chart of numbers in your PowerPoint deck when you can create an iconographic representation? Pictures paint a thousand words, and people will respond to them more readily. Pictures are immediately and easily absorbable, whereas pages of text take too long to digest. Sell to the fast food culture we live in and watch your B2B lead generation efforts yield more prospects!

When it comes to B2B lead generation, remember to stay alive, stay relevant, stay focused, chose the right channels and let your solutions be seen with compelling visual imagery. By putting the right message in front of the right people in the right way, you can capture much more effective traffic. I would rather have 10 genuine hot leads visit my site every day than 1,000 looky-loos who have wandered in through some vague digital marketing pitch. B2B lead generation that is about speaking to targeted industry audiences—in small, interesting ways—is much more powerful than spreading a message across the universe that falls on mostly deaf ears.



5 Driving Inbound Marketing Leads Through Effective Website Conversion

Inbound marketing is all about bringing in leads. Right? The whole purpose is to drive demand and begin communication with prospective buyers of your product(s) or services(s). In discussions of inbound marketing best practices, a lot of attention and strategy is aimed at driving more traffic to your website. Get more outreach, appeal to a broader audience and get the right people to come to you! Everybody wants to get more traffic to their content and website, but a critical focus that is often overlooked is converting those people once they DO come to you. What is the point of opening the flood gates and having crowds of people stand in your lobby if all they do is mill around and refuse to enter your offices and talk to you? The goal of lead generation is conversion—getting people to take action and reach out to you. Driving loads of new visitors via inbound marketing is necessary, but the most important prospects are those who are already on your site!

So, if you think of new traffic as your gold currency, then the people currently browsing the website are your diamonds. I would

much rather see my “unique visitors” statistics stay consistent and watch as my form fills and conversion ratios skyrocket than see daily traffic numbers go up even as nobody takes action on the site. How can we increase user engagement? How can website conversion be factored into inbound marketing? Industry averages suggest that a conversion ratio of 5% to 10% is a good target goal. If your average visitor-to-prospect ratio is below that, things need to change. Let’s take a look at some tips to for getting—and keeping—a dialogue going between you and your potential buyers or clients:

Make sure your messaging speaks to the needs of the client. First impressions are everything. Data has shown that your website has 10 seconds or less to capture a visitor’s attention before they consider leaving. In the world of inbound marketing, there is so much syndicated content and so many social media and website properties out there, the average person floats through a sea of data and imagery every day. As a result, your audience’s attention span and their tolerance for processing information is extremely

limited. Getting through in seconds with the right message that speaks to users’ needs and addresses their questions is imperative:

1. **Use “human speak.”** Avoid getting too technical with public pages. It is fine to relay the inner workings of your technology product or software and provide IT or engineering details, but save all that for the inner pages where more technically minded people will navigate to. Keep the main pages of the website on a conversational level, relaying use cases and easy-to-understand reasoning and marketing language. Think of the scenario of the average consumer buying a new car: Talk about the driving experience, not the schematic of the engine. If your messaging and written content can be quickly understood and feels like the beginning of a conversation, prospects will be more likely to continue poking around.
2. **Tell users how you can make their life better.** Focus on the consumer benefits of your offering; don’t focus solely on product features or service processes. Tell website visitors WHAT your offerings can do for them instead of focusing on HOW you do it. People have an inherent need to solve their problems. In the B2B environment, the customer’s goal is to find the vendor—whether through outbound or inbound marketing campaigns—that will solve a pain point or increase profitability. If you can capture attention right away by having website content that speaks clearly to the benefits of your product or service, you will make prospects comfortable and instill confidence. No matter how forcefully you extoll the amazing and innovative ways your product is

built and the revolutionary features it has, all that will be lost on someone if they can’t quickly and easily understand the results they are going to achieve using it.

Excite them with your call-to-action (CTA). Once the end user is familiar with your product or service and is considering engaging with you, what motivates them to fill out your form or download an asset or share contact information? Proper inbound marketing and lead generation is all about starting conversations with prospects. Once that happens, how do you get them to reach out? Your call-to-action (CTA) links and buttons! These are the callouts that are placed all over your site (in your header, navigation, embedded into various pages, etc.) that drive people to contact you or register for assets or events. CTAs must be engaging and generate excitement:

1. **Make sure your CTA message is timely.** Data shows that people are far more likely to click through to action when the message is timely and has a sense of urgency. Buttons that simply say “Contact Us” all over your site do very little to generate urgency. Whether you click it today or next week, it will still be there. It’s much better for your CTA to say “Reach Out TODAY!” or “Drive Profit Immediately.”
2. **Make sure your CTA sends the right message in the right place.** There is no purpose in putting an actionable CTA to register for your upcoming webinar about “How to Onboard New Partners” on your Company Leadership page. CTAs are great at creating movement, but only when the CTA message is directly relevant to the content or



information the user is currently looking at. Strike while the iron is hot!

Make your forms user-friendly and engaging. Once your inbound marketing has worked its magic and the end user comes to your site, understands what you offer, sees the value in it and lands on your intended form—this is the critical moment when they will engage or not. Whether your form is a special offer, registration for a webinar or asset, or a simple contact form, the user has a decision to make in reaching out to you. Even if users perceive high value in your product or service and are considering you as a vendor, they STILL might not take action if your form or contact method is too cumbersome or intimidating:

“Make sure your messaging speaks to the needs of the client. First impressions are everything. Data has shown that your website has 10 seconds or less to capture a visitor’s attention before they consider leaving. In the world of inbound marketing, there is so much syndicated content and so many social media and website properties out there, the average person floats through a sea of data and imagery every day.”

- 1. Make it easy.** When the end user finally gets to your form and is ready to reach out to you, the last thing they want to see is a long, complicated endless scroll of fields to fill in. How many times have you encountered a form on the Internet that looked like it would take an hour to complete, prompting you to back out? People want your offering, but they also want the process of getting it to be easy. Make sure your form is as short and as unimposing as possible. Ask only for information that is absolutely necessary to your business. Remember, there are ways of capturing more information without initially overwhelming users, and this leads us to our second point...
- 2. Be unobtrusive about capturing information.** If name, title and email address are insufficient to capture for your business needs, you can use a method called “progressive profiling.” This is a form-building technique that adds additional fields for the user to fill out based on certain input. Alternate fields pop up as the user progresses through the form. Users may see only four fields when they start, but based on their answers other fields may appear. By the end of the process, users have filled out more fields than they started with. This is a clever way to have them start small but end up giving you everything you want to know.
- 3. Keep users’ attention after they engage.** Once a user has filled out your form and submitted it, what happens? The landing page or swapped-out messaging that replaces the form when they are done should not just be a simple “thank you.” Instead, try to keep users engaged with your site content. Post-form redirection CTAs are a valuable tool. The post-form landing page should have some sort of relevant link to content or site information that is associated with the asset or offering the user just submitted for. Suggest further content to get them to know you better and enhance their confidence level once they have actively engaged with you.

The journey users take after landing on your site should be as smooth, effortless and engaging as a good conversation—from your initial messaging (speak to their needs) to your CTAs (be relevant and actionable) and finally to your forms or contact methods (make it easy, and be inviting and engaging). Inbound marketing is not just about getting potential buyers to your website. It’s about getting them to engage with the website and start talking to you! The more you can speak TO them, and not just AT them, the more they will be encouraged to convert to a prospect and consider you a potential vendor.



6

Cold Email Template Tricks That Get HOT Lead Returns

Email marketing is still a very effective method of lead generation, even though other methods like social engagement, content marketing through thought leadership and group dialoguing on networking sites are rapidly gaining momentum. The tried-and-true solution of email is still about as personal as you can get for a first-time touch. But this is not “spray and pray”...one template will not work for everyone! Not everyone likes pizza, so make sure you also have a hamburger or grilled cheese handy.

When developing a cold email template, keep in mind that you are often going to create a set of them—to be used for various audiences or approaches—in order to add some custom touches and answer important questions. Most marketing automation platforms and solutions these days have emailing tools that allow you to segment your mailing list and deliver different versions of your email marketing template(s) based on audience type. Here are 5 tips, in the form of questions that your recipient might ask themselves (and that you should

anticipate!) when you create your cold email template(s):

- 1. Are you talking to me?** Hang on, this is not Robert De Niro threatening you. No need to start fearing taxi drivers. What this question implies is that the recipient of your email might begin to read your email and wonder who you are talking to. Are you talking in third person, in a general “scripted” sort of way (like a generic, operational-type sales pitch), or are you actually speaking to your target reader in a personal and connected way? The best emails come across as conversational. Speak in first person, refer to yourself in a way that emphasizes your humanness, and talk about what needs or solutions might be personal to your audience. You can do this in a cold email template by personalizing the speech, using your marketing automation platform to insert the recipient’s name and job title, and customizing the email content to the recipient’s industry. One template won’t cover all titles in all industries; if you segment your mailing list by job title or industry, you can craft a handful of templates that



- will customize to your audience much more effectively.
- 2. Why should I care?** The only reason someone would open your email is if the subject line speaks to their interest, and the only reason they would respond to the call-to-action (CTA) or engagement promoted in it is if they see it as a solution that provides them some sort of business value. Even if you offer a value pitch that may benefit recipients at some point in the future, the fact that you are in their mailbox means that they are currently looking at you from within an immediate and categorical reference point. People scan emails and always have their finger on the delete button. You have to speak powerfully, and you have to speak to the “right now.” You might have the best BAND-AIDS in the world that are waterproof up to 300 meters deep and will adhere even during a gorilla attack...but I have little use for them unless I have a cut at that exact moment. Yes, people do look for valuable products and services that they think they might need down the line, but at best they'll make a note of items that come across their radar for later research when the need arises. If your cold email template does not speak to them right now, you lose the lion's share of its potential power and urgency and often find yourself in the trash folder.
 - 3. Am I taking a risk here?** Okay, let's say you got them to open and now they are actually reading your email. Bravo! Give this marketer a chocolate bar. At this point they have seen some value in what you are providing, but the next question that comes up is if it is worth the risk of going down the rabbit hole and beginning a conversation with you. What are the inherent benefits of your solution? How does that solution fit into the recipient's current growth or revenue needs? What is the possible downside of engaging with you? To get them over this hump and land them into your lap, provide examples of results that you've achieved for other clients. Show them how your product is the solution they need, not by listing all the ground-breaking innovations of your feature set in bullet points, but rather by referring to use cases showing how current customers created growth in their business using your company's offering. I am about to say a risky thing here: Your solution might not be the “best” in the market (after all, we live in a time of entrepreneurial competition), but it might be the best to solve the unique requirements of the prospect who is reading your email. Show the prospect what you've done for others, in a few lines only, and you might wind up speaking directly to their sensibilities.
 - 4. Do I get a say in this?** No one wants to be spoken TO, they want to converse WITH. Educate, don't lecture. It is important that you phrase your messaging in your cold email template from a collaborative, teamwork point of view. “We work with your team...” “Under your advisement...” “Let our expert staff advise your team...”—these are some examples of positioning

your message to make the reader feel like they are a part of the solution, not just a passive recipient. Customers will gravitate towards vendors they think will support their efforts and reflect back onto their team, not overshadow it. Also, make sure that your readers feel like they have a say in how and when they begin communicating with you. Ask them to reach out and let you know when would be the best date/time to have a quick chat about what you can provide. Leave the ball in their court. Don't say you will call them soon or propose an exact appointment opportunity. On the other hand, be forthright in encouraging further conversation.

- 5. Can I respond easily?** “Print out the attached map.” “Go to these GPS coordinates.” “Knock on the third orange door to the left.” “Give us your Social Security number and do three minutes worth of Samba dancing to get my private mobile number.” Yeah, you're right, these CTAs won't motivate your prospect to get in touch with you. When putting together your cold email template, make sure to include a clear, easy, actionable method of communicating with you—perhaps a simple CTA that leads to a short form, or a direct desk number with an enticing invitation to call at their convenience. Also, many inside sales teams are now using links to apps that allow one-click calendar scheduling to book an appointment to chat. The easier and more convenient you make the process for someone to get back to you, the more likely it is they'll reach out.

Cold email template concepting and design is a finicky art form and there are limitless subtleties that might make the difference between getting through with your message or going directly into the delete universe. Speak directly and personally to your reader, give them a value they can connect with, make them feel at ease, involve them in the decision to reach out and make it easy for them to do so. If you abide by these psychological considerations and put yourself in the shoes of your reader, you might find that your inbox is lighting up with responses. Remember, your email blast might be sent out by an automated system, but the content starts with a

“ *When developing a cold email template, keep in mind that you are often going to create a set of them—to be used for various audiences or approaches—in order to add some custom touches and answer important questions.* ”

7

Making Appointment Setting Work for B2B Lead Generation Campaigns

Appointment setting for lead generation in the business-to-business (B2B) segment has existed now for about 30 years or so. To be exact, the evolution really started with the rise of database providers like Hoover and InfoUSA at a national level in the US in the 70s and 80s, and then in other countries as various prospect list providers emerged. To attain appointments with a prospective buyer, a company needs three things: a list, a phone and an inside sales rep who is ready and willing to be hung up on or rejected 90% of the time in order to succeed 10% of the time, making hundreds of calls to set up just a few appointments. Unfortunately, that methodology has become less and less effective as prospective buyers are inundated with push marketing and multiple telemarketing shops harvest the same list again and again for various sales efforts. As a result, appointment setting has become a dying art – except when coupled with a truly integrated marketing approach that focuses heavily on inbound marketing.

Here is a brief summary of where appointment setting may

work effectively and where it is bound to fail.

- 1. Understanding What Appointment Setting Is:** Success is a function of expectation, so before success can be achieved with an appointment setting campaign, it is important to understand what appointment setting is and what it can do for lead generation. However, before we delve into specific aspect of appointment setting, let's understand the basic concept of marketing qualified lead (MQL) and sales qualified lead (SQL).

What is MQL? Before the advent of the Internet and digital marketing, telemarketing was a major way of reaching out to prospects to promote products and solutions. As a part of that engagement, a B2B telemarketer would typically ask four key questions: Do you have a need for this solution? Do you have the budget to procure this solution? Do you have the authority to decide? Do you have a specific timeline to acquire a solution of this nature? This led to the advent of the acronym BANT (Budget-Authority-Need-

Timing). There have been various iterations of the term – such as eBANT, where the “e” stands for environment – particularly in industries like manufacturing, technology and insurance, where domain specificity is required. But the goal has always been to understand whether, using the BANT criteria, there is a good fit. If so, it would typically lead to a marketing qualified lead (MQL). However, never in this preliminary discussion was the exact sales potential determined, because that is a much deeper, more complex conversation.

What is SQL? Once an MQL has been generated, it leads to an appointment with a sales rep or an expert, who now attempts to convert it into a sales qualified lead (SQL). Understanding this subtle but critical difference between MQL and SQL sets the foundation for success in an appointment setting campaign. Typically, nearly 70% of MQL leads do not lead to an immediate or future sales opportunity. Why? First, because the prospect may have an interest in a specific solution from a vendor, but he/she may also be looking at other vendors. In the end, the prospect will buy from only one. Second, the odds are against a vendor who doesn't have leading market share (at least 20-30%). If, for example, a vendor has 10% market share, then the probability that an appointment may lead to an opportunity is only 1 of 10. Finally, the efficacy and efficiency of the sales person will help determine whether s/he can convert an MQL effectively to an SQL by answering critical sales objections and questions. Most opportunities die at this engagement level, because many sales reps do not prepare ahead of the appointment. So, no matter how effective the marketing appointment setting has been, sales must still perform in order to convert the MQL into an opportunity.

- 2. Where Appointment Setting Works:** Appointment setting campaigns used to have much broader application, but as years progressed and front end of the marketing funnel got fragmented because buyers could find out about prospective vendors solutions through other means (e.g., social media, peer groups, reviews, etc.), the value that outbound telemarketing offers has decreased substantially. That said, appointment setting still tends to work in some emerging markets, where media channels are not as mature or content-rich as they are in the developed markets. In general, however, the efficacy of appointment setting has decreased substantially across the board. Today, appointment setting is most likely to work if it is properly integrated with other digital means.
- 3. Integrated Appointment Setting and Prospecting:** Over the past 10 years, and especially over the past 5 years, inbound marketing has changed how leads are generated.

Search and social marketing play a pivotal role in awareness generation and in some cases completely eliminate the need for outbound telemarketing to generate awareness. However, coupled with effective inbound (search and social) and outbound (email, event, etc.) marketing, appointment setting can still be the important last step in lead qualification and setting up qualified sales calls with expensive sales resources. This applies across all segments (SMB, mid-market and enterprise) and verticals. However, thoughtful planning and integration is needed for an appointment setting campaign to be successful.

While appointment setting remains an important tactic for lead generation, how and where it works best has changed dramatically over the past decade. When integrated well with digital marketing, planned properly and executed effectively, appointment setting campaigns can still provide ROI; however, when used as a standalone effort by mimicking the old archaic approach of random cold calling to a list, it barely produces results anymore.

“When you begin thinking about various types of channel marketing solutions, it's helpful to think in terms of two key categories: the channel marketing automation platform you will deploy and the channel marketing services you will require”



8

Four Methods of Refining Your Tele-prospecting to Improve Sales Success

Telemarketing has been around for decades, and everyone is very familiar with the dinnertime “Are you happy with your long distance service?” phone call. A proven technique for drumming up widespread sales and awareness, telemarketing has become a cultural norm. The evolution of marketing in recent years has marked the emergence of a new term, “inside sales,” that refers to a more focused, prospected and targeted approach to lead development—not just churn. Teleprospecting grew out of inside sales and has now become a first-tier technique used in conjunction with other lead and demand generation efforts to not only commence dialogue but also achieve qualification of new leads that come across any vendor’s radar. Teleprospecting best practices to ensure sales success are now a focal point for any good sales enablement scenario.

It is important to differentiate between the goals and definitions of teleprospecting versus telemarketing. The two terms are often used interchangeably. Both are seen as a phone-based sales technique, but in reality the approaches and end goals are vastly

different. Telemarketing is a one-shot “spray and pray” tactic that is crafted to cover a vast audience base, using a templated script and with a focus on generating a lead to pass on to sales—but with little consideration of the path of that lead takes once it is passed along. It is a rapid, repetitive and funneled approach.

Whereas the primary goal of the telemarketer is to quickly resonate with the target audience and close a sale, teleprospecting is about connecting with leads, identifying their “pain points” and qualifying areas of need that the service or product addresses. The teleprospector is tasked with calling a very focused, crafted list of leads that have been pre-identified as market prospects, and spending time to communicate one-to-one to establish a true qualification so the sales team is equipped to take the lead to the next tier of the sales process. This initial communication may start with an introductory script, but unlike the telemarketer who sticks to the tree structure of the finite pitch, the teleprospector quickly moves on to appropriate next-step questions based on the lead’s answers. The idea is to guide the dialogue to a point where the lead

realizes a particular service or product is needed.

Let's take a look at four key considerations in guiding your teleprospecting reps as they work to establish a successful relationship between qualifying a lead and closing a sale:

- 1. Align prospecting and sales teams regionally.** Companies that are moving toward a large global footprint tend to have sales teams that were fostered based on industry or market segments. When teleprospecting teams come on board to begin qualifying leads in these new areas, these reps may be aligned with sales team members accordingly. This creates a disjointed regional approach, with lead lists spread over dispersed countries. A better practice is to review your global reach and reassign sales teams to regional groupings—and have the teleprospecting reps align accordingly. This will create better cohesion between prospecting and sales, and allow for coordinated approaches in a unified and timely manner. Adaptation to cultural norms and traditions can also be achieved and carried through contiguous efforts between both teams.
- 2. Develop a pass-back conduit between sales and teleprospectors.** Once a lead has been qualified and passed to the sales team's queue, it should be handled or prioritized according to company policy or quarterly goals. Often a lead may become stale or cold to the sales rep, whether immediately (due to hand-off change or lag time) or as an effect of not having been nurtured for some time. In cases like these, passing the lead back to the teleprospecting team to "reignite" would be advantageous. The rep had previously developed a relationship with this lead through the prospecting cycle, and hearing from a familiar contact may warm the lead up again. The prospect may even open with newly developed needs or pain points that can be used as a new advantage to sales. People tend to be attracted most by what they can identify with or what seems familiar. This loop can warm up a lead again so that traction is re-established when passed back to sales for follow-up.
- 3. Provide supportive resources to your prospecting rep.** The best practice for any teleprospecting rep is to go into any initial touch with the best research and information possible. Having a brief but effective dossier on the prospect will help the rep develop trust and insight with the lead as they go through qualification. There are many tools and resources available that will help enhance their call preparation—social media, MSPs, business news/review sites, etc.—and these should all be available and accessible to your prospecting rep. In turn, once the lead qualification first touch has been achieved, post-call communication tools—file sharing services, CRMs, automation platforms—are the best ways for the rep to keep up the dialogue and take the lead through the

qualification journey, easing hand-off to sales in a refined flow.

- 4. Clearly define teleprospecting management.** Teleprospecting is indeed a step in the sales process, but it should always be defined as a marketing effort. Make sure accountability and reporting fall to marketing managers. There is a tendency to view accountability as having ties to both marketing and sales, due to the nature of prospecting as the step between "getting the customer into the restaurant and sitting them down to serve them their dinner." But don't let management of teleprospecting float back and forth between marketing, channel management and sales. Every step should be managed by one accountable department to ensure consistent processes and reporting. This will help with time management, flow of information and corporate culture solidarity.

Achieving the right leads and the right prospects for your sales team to gain momentum is the end goal of any teleprospecting effort. It may be one of many methods of lead qualification or generation, but it is by far the most personal and communicative. To ensure that you are getting the most out of any prospecting campaign, the four considerations presented here will help you align, hold accountable and equip your reps with both tactical and conceptual parameters in which to operate most efficiently. Hold the phones...it's time to enhance your prospecting results!

“Teleprospecting grew out of inside sales and has now become a first-tier technique used in conjunction with other lead and demand generation efforts to not only commence dialogue but also achieve qualification of new leads that come across any vendor's radar. Teleprospecting best practices to ensure sales success are now a focal point for any good sales enablement scenario.”



9

5 Key Questions That Unlock B2B Lead Generation Conversion

Recently I saw a bumper sticker on a slow-moving vehicle on the highway that read, "I am not in your HURRY!" While I respect the slower-paced lifestyle of this driver, it made me think of making another bumper sticker: "I am not in your LAGTIME." It's all about perspective. I am not looking to rush you, so please move out of my way. To get respect, you have to give respect. Each of us has our own intentions and behavioral choices, and we need to see things from each other's perspective in order to communicate and get the proper results. This is a critical principle to keep in mind as a marketer as you consider your B2B lead generation efforts.

When preparing your marketing approach to B2B demand or lead generation, whether in channel marketing or any marketing area, remember that you are trying to create awareness and interest based not only on the merits of your product or service, but also on how your prospect might perceive the product or service from their own value set. It's also important to keep in mind that you are rarely trying to appeal to an individual, but instead are trying to capture the interest of a team. This team typically consists

of several decision-makers, so you have to think of how to get through collectively—on their level, and in a way that helps them achieve their goals.

Here are 5 questions to answer when devising a lead generation strategy that will help you personalize and capture your target customer's interest:

- 1. Who will consider my product/service, and how does it fit into the larger scheme of their company?**
As I mentioned above, B2B lead generation campaigns often have to appeal to a team rather than an individual. So it is important to think of the target team as a facet of the larger corporate picture—position your product/service as a benefit that has helped similar teams achieve departmental goals that align with what your prospects might be looking for when searching for solutions similar to yours.
- 2. How can my marketing come across as solution rather than a sales pitch?**
It's understood that you might want to jump right out there



and have your B2B lead generation campaigns start extolling the amazing features and results that using your product/service can bring to any client, but this self-proclaimed praise might not speak to the needs of your potential customer. Of course, you can't get their attention and have them consider your company as a vendor unless they hear about the wonderful things you can bring to them—but the primary message should be positioned to emphasize how useful your SOLUTION has been for other clients, not how great your PRODUCT is. Your toast-making and butter-churning modules may be the most innovative in the industry, but your story should focus on how your toast and butter is the superior fit for your customer's breakfast buffet and has helped it become the most successful one in town.

3. What influences might be relevant to the prospecting process of my customer?

The influential factors that feed into a company's or team's decision to engage with a vendor are both internal and external. Of course, the final decision to reach out to a provider will likely be made by a key individual, but the data and research that informs the decision is often the result of a group effort. Crowd-sourcing is a common approach to business research these days, so positive external opinions, feedback and reviews are important. Your marketing must speak to your audience in both direct and indirect ways. What the public thinks of your company will get back to and sway your prospects' interest level. Make sure that your B2B lead generation marketing has a two-pronged approach: a) specific beneficial solution messaging that will appeal to your customer and b) widespread corporate awareness and thought leadership that will educate the public about the position and value of your company.

4. How can I get my customer(s) to see my product/service as an investment?

Any time a corporate department has to select a vendor for a business need, they look at their budget and view any new product or service as another expense. Money out the door is a cost. Onboarding and ramping up a new product or service is always part of the initial cost, but palpable ROI and revenue growth will offset this expense and provide realized value. For most customers there tends to be more psychological resistance to immediate expenditure (possibility of failure) than potential revenue growth (possibility of success). The trick is to appease this concern and position your offering in their minds as an investment. Backing your offering with success stories and studies that show ROI achievements by similar clients will help get the dialogue going with new leads. They will see your offering as a roadmap to profitability, even if they have to pay a few tolls to get there.

5. Who is winning in this deal, and how does it affect their interest and decision?

Without a doubt, if you generate a qualified prospect through your B2B lead generation and your sales team closes the deal, it's a win for you as a marketer. But how is this a win

for the customer? They have selected you as a vendor, and allocated budget to purchase your product/service, all based on an individual decision or group consensus. But how do you get your customer to perceive this as a win for their company? There is much more cross-departmental visibility these days from the management level down, so the decision to go with you as their vendor will very much be influenced the decision-makers' ability to frame the selection as an achievement for the entire corporation. Make sure that you position your marketing to inform the prospect how your solution not only solves their immediate pain points, but also will have a positive impact on the operations, ROI and growth trajectory of the entire company. If prospects think that your solution will directly affect perceptions of their team in the larger corporate structure, this is added value to them—both professionally and personally.

The primary point of these questions is to get you thinking. Every time you plan a new B2B lead generation effort or marketing campaign, think about how best to position your offering—not from a "I am going to sell this product to you because you probably need it" point of view, but from a "I have a product you might need and probably want me to sell you" angle. Always consider the customer's perspective. Think about how you can be the best vendor out there—as a solution provider. You will win not because of what your company does, but because of your ability to change the lives of the customers you are trying to get through to. Marketers want prospects to respect their product and see the benefits it brings to the industry, but prospects want marketers to respect their needs and show them how their product can make their professional lives better. Remember: To get respect, you have to give respect.

“When preparing your marketing approach to B2B demand or lead generation, whether in channel marketing or any marketing area, remember that you are trying to create awareness and interest based not only on the merits of your product or service, but also on how your prospect might perceive the product or service from their own value set.”

10

Does Lead Scoring Matter for Lead Management Software?

As we have discussed in earlier articles, lead management software is a form of business process automation that streamlines activities between marketing and sales to identify potential new business opportunities and enable sales closure. In this digital age, it is essential to strike the right balance between marketing and sales functions in order to achieve and track return on investment (ROI). Lead scoring plays a critical role in accomplishing this. In this article, we will explore why lead scoring is so important in this context.

Customer relationship management (CRM) software entered the marketplace about two decades ago and was used at that time primarily by large enterprises. However, a lot has changed since then. CRM is no longer just for large enterprises. It is now deployed in organizations of all sizes. However, over the past 10 years or so we have also witnessed a parallel development: the advent of marketing automation tools. Businesses ranging from those with just a few employees to the very largest enterprises are now dealing with a new challenge: integration between a marketing

automation platform and a CRM. This is where lead management software fits in.

It's important to point out that most lead management software is actually offered as a feature or component of a more comprehensive platform, rather than as standalone software. That is, lead management capabilities are typically built into both CRM and marketing automation platforms. However, in practice lead management is really a functional bridge between marketing and sales, and that's how I am thinking of lead management for the purposes of this article.

Now, if an organization is dealing with a large volume of inbound leads that need to be nurtured, qualified and pursued by sales, in order to drive sales efficiency it is essential to establish some lead scoring standards to ensure each lead is properly nurtured digitally before it is touched by the sales function.

Lead scoring logic tends to be directly related to the buying

stages that a prospect goes through on the way to a completed sale. Typically, most marketing processes focus on three core stages of the buying journey: awareness, interest and trial.

Depending on the nature of the solution (ranging from simple to complex) and price (from low to high), the business logic for lead scoring can vary greatly in lead management software. In the case of enterprise sales, where the value of a transaction is high and relatively complex, marketing may pass a lead to a business development rep much earlier than in other contexts to initiate face-to-face contact. With simpler, lower-volume, lower-value transactions, it is often more effective if sales engages at a much later stage. Finding the proper balance between marketing and sales activities under different buying circumstances is an incredibly important function of lead management software.

In subsequent articles, we will explore the multiple variables that determine how to configure lead management software for lead scoring under various conditions. But one principle remains consistent across various deployments, industries and solution types, and it should always be kept in mind: Lead scoring exists to establish a set of standards that determine exactly how much nurturing a lead requires from marketing before it is passed on to the sales engagement process.

If you understand lead scoring as the digital bridge or handshake between marketing and sales functions, then it should be clear why it is such a critical feature in all lead management software. To come back to the question I began with: Does lead scoring matter in lead management software? Absolutely.

“Lead scoring logic tends to be directly related to the buying stages that a prospect goes through on the way to a completed sale. Typically, most marketing processes focus on three core stages of the buying journey: awareness, interest and trial.”



11

Lead Management as a Key Channel Management Capability

Leads, leads everywhere—but not a single one to close. Isn't this what you hear almost every day from vendors and their partners? Vendors spend millions on end-user marketing to generate leads, while partners rarely follow up to close on them. That's what a vendor would say. On the other hand the partners say, "Well, I never get a good lead from my vendor. How can I grow their business without decent leads?" This is where good lead management can save the day.

A channel is primarily a fulfillment mechanism. Yes, it can generate demand to extend a run rate business, but the primary purpose of a channel is to close and deliver. The job of marketing really belongs to the vendor. This is why lead management is so important. If it is not done right, not only do millions go to waste, but partner satisfaction—and ultimately business growth—drops substantially.

The good news is that there are now state-of-the-art lead management systems available in the marketplace for channel

professionals. Once you deploy an end-to-end lead management system, it will not only increase lead-to-revenue conversion rates substantially, but also it will reduce the hours you spend in managing leads manually or via an existing CRM system. While CRMs were designed for lead management, they are primarily a tool for indirect sales. That's why a purpose-built lead management system for channel managers is essential to drive channel sales productivity to the next level. Let's explore in a bit more detail how this can be done.

- 1. Partner profile management:** Before you deploy a lead management capability, it is essential to profile your partner base and organize them into groups by determining their sales competency, revenue velocity, market focus and other parameters. Once you have created these groups in your partner portal or in a partner relationship management system, you are now able to assign these groups for various lead management activities that match their profile.

2. **Lead distribution policy:** Once you have your partner groups set up, the next step is to figure out who gets what. Your organization may be generating thousands of leads per month. Do all leads go to a handful of partners, or are the leads distributed to all partners, or is it somewhere in between? Do you want to allocate healthcare leads to partners who have deep practices in healthcare? That would make sense, right? Are you going to have “open accounts” (all can pursue) or “named accounts” (dedicated to a few partners)? There are many other elements that should be considered in your lead distribution policy. So, thinking through your lead distribution policy in detail is the second most important step for your lead management activity.
3. **Lead lifecycle management:** Once you have distributed a lead, your lead lifecycle management approach will clearly define how you manage the response behaviors of your channel partners. Do your partners get seven days or 30 days to follow up and close out a lead or take it to the next level? What happens if they don't follow up within a given time? Do you take the lead back and give it to another partner? What happens if the first partner continues to follow up despite your transferring that lead to some other partners? You will have to think through these lead management implications to make sure that when you automate the processes, they reflect your true channel policy.
4. **Automating lead management:** Once you have figured out how you will drive lead management, then you need to look for a purpose-built lead management system. The same old CRMs we're all familiar with don't really work for a distributed

channel organization. Even though you can technically make your existing CRM work (see Why CRMs Don't Work as Partner Relationship Management Systems), the cost and complexity of doing so always makes a dedicated lead management system a much better choice.

5. **Lead management reporting:** Once you have deployed lead management policies and automated via a lead management system, it's crucial to focus on reporting. You should have dedicated lead management resources by each geography and territory (depending on volume). You also need to make sure there is reporting that allows you to immediately see at each level what is working and what is not. Having a business intelligence (BI) engine as an integrated part of your lead management capability is critical. When you are selecting a lead management system, make sure the system allows you to slice and dice the data using parameters that inform your channel strategy.

Building lead management as a key channel management capability is critical, because—as we noted earlier—the channel is primarily a fulfillment arm. While the vendor should always enable partners with partner marketing management (PMM) tools, the vendor can never relinquish its primary responsibility of generating leads and giving them to partners to follow up on and close. You don't expect your sales people to generate your own leads; you have marketing people to do the job for them. So why wouldn't you do the same for your channel partners, whom you call resellers (and not remarketers)? A purpose-built lead management system will make that job much easier.



12

Making Lead Management Work for Your Channel Sales

Lead management appears to be extremely complicated for organizations selling through the channel. However, it doesn't have to be that way. While it does require some planning, developing and deployment—along with a lot of persistence—most organizations can do it right with a bit of guidance and careful planning. Yes, it can get complex if you are a very large enterprise account, and have competing sales motions—direct (internal) sales and indirect (channel) sales—but even in that case things can be done properly with a certain level of dedication and focus.

Let's take a moment and explore from a partner perspective why most lead management efforts tend to fail. In most cases a vendor organizes lead management around their own needs instead of the needs of its partner base. Vendors typically focus on maximizing their own returns instead of focusing on partner returns. This is in direct conflict with the core tenet of channel management. If a vendor does not focus on partner profitability as a primary driver or motive for the partner to engage with a vendor,

then the foundation of the partnership is on the shaky ground from the very beginning. Lead management that is not designed to protect the partner's interest is highly unlikely to succeed. This is why it is very important to think through the purpose of lead management as you develop a strategy for applying it.

Channel sales is about sales. We can never forget that. The purpose of lead generation, whether it is vendor-led or partner-led, always needs to begin with the end in mind: the closing of a transaction. In this context, designing a system with the partner's perspective in mind is very important. There are a few unique strategies or concepts like “shark tank” and “round robin” and so on that are interesting and do work occasionally. But most partners hate the idea that if they are late on a deal for some reason or other they may lose it to another partner. Fear is not generally an effective motivator, especially when you have multiple ways to escape. Therefore, if you are considering lead management for your channel, start with a specific commitment or named account as a focused way to start.



It is better to have a few partners in your lead management programs that work instead of having the majority of your channel be part of those programs just for the sake of inclusion. In the latter cases, partners end up being insecure about what might happen to those leads and whether they will eventually be able to complete the sale. While certainly you want to provide options to your end customers and therefore competition among your partners, that only works with a highly mature channel where you have enough leads to share. If you're just feeding little fish to big ones, that approach will almost never work.

The foundation of your lead management efforts always depends on your overall channel management philosophy. Do you drive your sales through a broad, overly distributed channel, or do you drive your sales via a focused narrow channel with a limited set of partners? Lead management can provide an answer or an approach to dealing with this fundamental question.

Lead management tends to work best with a narrow channel where a few partners have dedicated sales territory and have a focused approach to who they serve, and where the vendor works with them to grow those accounts or segments. If, on the other hand, a vendor is perceived as a "big brother" and over-distributes via a broader channel, then partners will almost always be afraid of losing money on their marketing and sales investments. It is very important to have clarify your thinking about this before you begin to drive a specific lead management agenda.

Yes, there are cases, as I noted earlier, where a "shark tank" or open account approach can work, but even in that case you need

to limit how many partners pursue a specific lead and determine what criteria you are going to use to select those partners. If you open up a potential prospect to too many partners you risk irking the end users with a plethora of hungry sales rep reaching out. A balanced approach of three to four partners selected based on their reach, expertise and ability to support the end-user needs probably makes the most sense.

Thoughtful planning of your channel strategy is critical in laying the foundation for your lead management framework. When you align your channel strategy with your lead management tactics, the chances that lead management will work for your channel go up exponentially. We see this every day among our clients who have done a good job in thinking this through, as opposed to those who are just trying to deploy lead management for the sake of doing what they think they are supposed to do. I sincerely hope your organization belongs to the former group.

“ *Do you drive your sales through a broad, overly distributed channel, or do you drive your sales via a focused narrow channel with a limited set of partners? Lead management can provide an answer or an approach to dealing with this fundamental question.* ”



13 Why a Lead Management System Is Critical for Channel Sales

Most vendors spend millions of dollars in generating end user awareness and inbound leads. However, very few have systems in place for getting those leads effectively to channel partners. Instead, many of those leads tend to be pursued by inside sales teams, but lack of an integrated channel lead management system substantially reduces marketing ROI.

At ZINFI, we regularly do channel partner satisfaction surveys and ask them how vendors can help them grow their businesses. The number one item on the list is distribution of good leads to partner sales reps. What we've found is that, even where leads are forwarded to top tier partners, very rarely do they have a structured system in place where leads are distributed, nurtured, qualified, tracked and closed. However, a good Channel Marketing Automation platform can significantly increase sales closures through a proper lead management system.

Before we delve into this topic, let's make sure we are clear what we mean by a lead management system. It is an automated,

programmatic way of generating, allocating and tracking the performance of end user leads that have been provided to channel partners. Without an end-to-end automated platform, all this would be really hard to achieve. A state of the art lead management system should have a few core components:

- 1. Prospect Records Management** – Since most lead management systems need to connect to a Customer Relationship Management (CRM) platform, it is essential that the prospect records management system is built upon a CRM-like structure. This greatly enhances data flow between the lead management system as well as other CRM platforms on the vendor or partner side.
- 2. Records Life Cycle Management** – Once leads have been distributed to partner's sales team, it should be possible to move the record through various sales cycles and track progress from stage to stage. Vendors should be able to log into the platform to check the progress of each record and the overall status of the pipeline. The partner should be able to



record events like converting a prospect to a contact and adding opportunities to create a pipeline forecast.

3. **Lead Distribution and Withdrawal** – This is a critical feature for vendors, first of all to make sure a set of leads can be given to a set of partners, but also, if partners are not following up after a certain time, to be able to withdraw the leads back into the Prospect Records Management system for redistribution to other partners.
4. **Lead Distribution Rule Set** – A vendor should be able to push leads manually or automatically to a set of partners based on the lead type (SMB, Mid-Market, Enterprise, or other categorization) and also to match partner competencies, locations, and so on. This ability to create rule sets adds an important layer of automation to lead distribution, which gets the leads to partner team as soon as they are generated.
5. **Account Protection** – Certain end user accounts are managed by large or premier partners and a vendor may want to protect these accounts. The lead management system has to be able to protect one or multiple accounts and automatically push leads from those accounts to specific partners and sales people. On the other hand, if a vendor wants to have partners compete for certain accounts, they should be able to keep these leads as open records.
6. **Rewards Integration** – By integrating proper rewards and incentives, a vendor can greatly drive partner engagement and status reporting. We all know sales reps are busy and they have their own preferred CRM systems. However, a proper incentive structure around reporting can substantially enhance a vendor's ability to track lead status, by using sales rewards to motivate individuals to enter lead status details into the platform – either manually or by automatic synchronization by connecting their CRM accounts to the lead management system.
7. **Dynamic Reporting** – A state of the art lead management system should be able to provide dynamic reporting to both partners and vendors, so that lead and pipeline status can be tracked at multiple levels. Since selling is a competitive sport, the ability to share stack ranking among individual partner reps also drives better participation and adoption of channel programs.

While such a long list of requirements may be daunting to anyone considering a lead management system, a robust Channel Marketing Automation platform such as ZINFI's Partner Relationship Management (PRM) platform can not only facilitate lead distribution, but also substantially increase ROI.

“Lead management system is an automated, programmatic way of generating, allocating and tracking the performance of end user leads that have been provided to channel partners. Without an end-to-end automated platform, all this would be really hard to achieve.”

14 What is Lead Management Software?

What is lead management software? A simple definition would go something like this: business process automation software that streamlines activities between marketing and sales to identify potential new business opportunities and enable the closing of sales.

Now, to explain what lead management is functionally, we have to spend a few more minutes analyzing the process of lead generation and closure of a business transaction. Typically, lead management software automates every step from start to finish, encompassing lead generation, management and closure. In this article, we will explore these few critical stages.

The key components of lead management software are: 1) integrated lead generation capabilities, including integrated marketing tools, 2) a repository like a CRM to manage and process all the leads, and 3) the ability to distribute those leads to various groups of partners for processing.

Each of these three phases requires an integrated set of

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capabilities to be in place in order for lead management to succeed. In other words, good lead management software doesn't focus exclusively on lead routing and distribution capabilities, but it also enables users to generate leads with an integrated approach and distribute them to a diverse partner base efficiently.

Now, some of you may be thinking that, well, demand generation is beyond the scope of marketing automation software. That may be generally true, but advanced lead management software like that offered by ZINFI already comes with integrated demand generation capabilities. This out-of-the-box integrated capability significantly increases ease of use, reduces deployment and configuration time, and reduces operating costs.

The same applies to lead distribution and management. When you are trying to accommodate a variety of users within lead management software, the core capability must be linked to the creation of rules, groups, and dynamic management policies. Some of the policies may vary by region, territory, product types, etc., and the lead management software should be able to handle various go-to-market models without requiring the organization to spend boat loads of money in building customized customer configuration.

Finally, tracking and reporting of leads across the lead management lifecycle is incredibly important to drive return on investment (ROI). Your lead management software must have a

powerful, dynamic analytical engine to provide detailed, step-by-step visibility into what is working and what is not.

When properly configured, state-of-the-art lead management software can provide deep insight into a variety of lead generation and management activities. It can also identify process gaps, areas ripe for improvement and potential user training requirements to maximize ROI from any marketing and sales investment.

“Lead management software should be able to handle various go-to-market models without requiring the organization to spend boat loads of money in building customized customer configuration.”



15

Partner Relationship Management: Why Lead Management Needs to Be a Mobile Application

If you are selling through the channel, chances are your partner relationship management framework has some sort of a lead management program. It doesn't matter whether you are in insurance, real estate, telco, technology or finance—the entire purpose of your channel is to drive sales and, in many cases, to provide service.

Whether you are driving marketing to generate leads (in national franchises or insurance or investment brokerage firms, for example) or co-marketing with partners (as in industries like automotive, technology, telco and manufacturing), today successful partner relationship management requires a mobile approach towards lead management.

Why do I make that claim? The answer is relatively simple. In today's business world, salespeople live in their mobile devices, whether it's a smartphone or tablet or a thin laptop—or all three.

“In today's business world, salespeople live in their mobile devices, whether it's a smartphone or tablet or a thin laptop—or all three. So, if your partner portal is not mobile friendly and doesn't provide lead management on the go, you are handicapping your indirect sales team and making effective partner relationship management more difficult than it should be.”



It's all about having productive access via any screen, anywhere. So, if your partner portal is not mobile friendly and doesn't provide lead management on the go, you are handicapping your indirect sales team and making effective partner relationship management more difficult than it should be.

In addition to providing on-the-go access, a mobile device is simply a natural fit for lead management activities. Almost everyone today has their contact database synced in the cloud and, with the click of a button, can instantly call a client. However, if you are not able to enter notes, perform key tasks and update relevant information from a conversation in the lead management system during that call, it's likely you will either forget to do so altogether or enter wrong or incomplete information when you get around to updating the client profile at a later time.

To understand the importance of mobile in lead generation, all you need to do is visualize a sales person at the airport. He or she is wearing a Bluetooth headset, is busy talking to a client, and at the same time is looking up all relevant information for that account on a mobile device and immediately sending relevant sales assets, product specs and other information directly from that device.

This is not a futuristic scenario. This is how partner relationship management is supposed to work. The use case is real and can be addressed today with ZINFI's "mobile first" Unified Channel Management (UCM) platform.

“ A mobile device is simply a natural fit for lead management activities. Almost everyone today has their contact database synced in the cloud and, with the click of a button, can instantly call a client. However, if you are not able to enter notes, perform key tasks and update relevant information from a conversation in the lead management system during that call, it's likely you will either forget to do so altogether or enter wrong or incomplete information when you get around to updating the client profile at a later time. ”



16 Definition of Unified Channel Management (UCM)

Unified Channel Management (UCM) allows a vendor organization selling through the channel to take an integrated approach by aligning channel policies, channel programs, channel people (both internal employees supporting the partner base and employees of external partners), business process automation and channel partners to build a high-performing global channel. This unified approach to channel management requires end-to-end automation of four core sub-processes:

- **Affiliate Marketing Management (AMM):** Affiliates are your partners who focus primarily on promoting your brand to their audiences using a variety of tactics. In return, you pay them commissions for driving traffic to your website. With our affiliate marketing management (AMM) solution, you can ensure you recruit the right partners and enable them to promote your products and services through their network. As your affiliates drive targeted traffic to your website, you track their performance, pay them commissions and grow your network.
- **Partner Relationship Management (PRM):** These partner management activities focus on optimizing and automating internal partner management processes to make it easier for partners to do business with the vendor. A properly configured PRM solution significantly reduces operational costs, efficiently allocates resources behind the partners who have the highest potential for driving profitable growth and significantly increases partner satisfaction.
- **Partner Marketing Management (PMM):** These channel marketing activities focus on enabling channel partners to drive demand from their prospects and customer base by leveraging the vendor's marketing assets and tools. A PMM solution can help vendors optimize the use of market development funds, stimulate purpose-driven demand generation and exert control over brand extension via channel partners.
- **Partner Incentives Management (PIM):** Rewarding your partners for channel program activities is critical for success. The Incentives Management module allows you to automate your incentive programs – including market development funds, rewards, rebates, commissions and more – across the entire partner journey. Reward high-performing partners and incentivize high-potential partners to perform better.



Core Modules Overview



Mobile Ready Application

The Mobile module comes with a set of mobile apps that are available for both iOS and Android platforms. Administrators can define which applications are available via mobile app, and which users have the access rights via mobile.



Alerts & Notification Management

The Alerts & Notifications module aggregates all system alerts via a unified console and allows users to set one or more notification preferences via email, SMS or mobile app. Users can also control the frequency of alerts, including individual or aggregate alerts.



FluidCMS™ Content Management

The FluidCMS™ module (and engine) allows administrators to use drag-and-drop tools to create and manage web and campaign content to build dynamic and personalized portal pages, campaigns and other content on the fly.



FlexiFlow™ Workflow Management

Using FlexiFlow™, administrators can set up different application layouts, approval and work flow logics, alerts, and other functions to automate any business workflows. This capability allows organizations to dynamically adapt to rapidly changing business needs.



Partners Profile Management

Partners Profile Management granularly manages partner records – prospects, accounts, contacts, performance data, etc. Using this module, organizations can segment partners effectively into groups with various parameters for optimized management.



Identify and Access Management (IAM)

With the Identify and Access Management (IAM) module, administrators can dynamically set up and manage user groups and profiles (roles), and granular access rights to various portal pages, applications, campaign content and other portal assets.



Enterprise Change Management

Enterprise Change Management keeps track of all changes made to the portal related to groups, users, content, workflows, and more. This is essential not only for audit purposes, but also for reversing changes that have been made unintentionally or intentionally.



Business Intelligence Reports

The Business Intelligence Reports module provides a wide range of default reports, as well as tools for editing & creating custom reports. This provides insights into what's working and what needs improving in channel performance and programs at local and global levels.



Centralized Interconnection (CENTRI™) Management

The Centralized Interconnection (CENTRI™) module allows administrators to seamlessly connect to third-party applications like CRM, LMS, ERP and POS via an easy-to-use connection management and field-mapping interface, including SAML 2.0 SSO.



Users & Group Management

The Users Management module allows administrators to quickly set up users and assign them to various groups and profiles. Users can be added manually or via group upload using Excel or third-party SSO.

Expanded Modules Overview



Documents Library Management

Documents Library enables channel organizations to share partner-facing documents with various partner users based on status and access rights. Documents can be dynamically published and configured with expiration dates/times based on custom rules.



Co-Branded Assets Management

The Co-Branded Assets Management module enables an organization to provide web-ready or print-quality digital assets to channel partners, who can then co-brand these assets and reuse them for various marketing- and sales-related activities.



Products Details Management

With the Products module, organizations can upload a variety of product-related content for use in both marketing and sales assets and activities. This module can also be used in conjunction with Configure Price Quote (CPQ) and Deal Registration.



Communicate To Partners Management

The Communicate module comes with a cluster of marketing tools, such as email, microsites, events and social, which can be used to recruit, engage and enable partners. These tools can be made available to all internal channel team members.



Community & Discussions Management

The Community module enables organizations to socially connect – both internally and externally – to facilitate communication and collaboration. This module seamlessly integrates with multiple UCM modules, but it can also work as a standalone module.



Partner Locator Management

Use Partner Locator to dynamically create a partner directory, making it easy for end users to find and contact partners who offer the right solutions. All leads generated from rule-based searches are fed into the UCM Lead module for distribution to specified users.



Partner Support Management

The Support (Help Desk) module gives organizations the tools they need to establish a structured support infrastructure for end users that extends above and beyond traditional product and services support. The module uses an industry-standard ticketing system.



Partner Survey Management

The Survey module can be used by anyone from the channel organization to get feedback from their partner base. Survey data can be aggregated via a reporting engine or housed individually within partner records.



Exchange Management

With the Exchange module, an organization can list a set of service providers for marketing, sales and other technical assistance for partners. Partner users can procure these pre-selected third-party vendors and pay for their services using MDF or their own funds.



Projects & Tasks Management

Seamless collaboration with internal and external team members on projects and programs is easy with the Projects & Tasks module, which comes with tasks, notebooks, file-sharing, and messaging features.

Affiliate Marketing Management (AMM)

Modules Overview



Marketplace Management

The Marketplace module enables an organization to create a thriving marketplace for its partners to sell its products and services to each other and to end-buyers in a private, invitation-only experience.



Promotion Management

ZINFI's Promotion Management module makes it easy for your affiliate marketing partners to promote content and products by leveraging UTM links and placing them on their website. Our UTM links tracker automatically documents which partners are generating which referrals.



Referral Management

Enable your affiliate partners to register referrals manually or automatically via link and advertising referrals. Automatically map each referral to a specific commission payment structure for both marketing and sales activities. Set up business rules to route referrals for automatic or manual approval flow.



Payment Management

Allow your affiliate partners to set up company and tax information to receive digital payments for their earned commissions. You can also enable partners to claim commissions manually or automatically for payments, and run performance analytics.

Partner Relationship Management (PRM)

Modules Overview



Partner Onboarding Management

Partner Onboarding Management automates partner recruitment and onboarding processes via step-by-step activities. Based on partner type, engagement and other variables, you can create different onboarding tracks.



Partner Contracts Management

The Partner Contracts Management module enables an organization to dynamically manage and keep track of all the contractual documents that channel partners sign during the various phases of the partner engagement cycle.



Partner Business Plans Management

With the Partner Business Plans Management module, organizations can develop business plans by working with internal and external partner stakeholders to ensure plan execution and compliance.



Partner Learning Management

The Partner Learning Management module enables an organization to manage channel partner training and certification by various partner tiers and types to grow partner competencies in a systematic way through structured curricula.



Partner Leads Management

Partner Leads Management automates lead distribution to your partner base and manages the entire "contacts to contracts" process. It can help engage partner sales reps via round robin, shark tank and other lead management strategies.



Deals Registration Management

The Deals module provides setup for deal registration criteria and workflows for an organization's partner base using UCM's FlexiFlow™ and CENTRI™ modules. Workflows can be very simple or can cover complex, comprehensive deal registration processes.



Configure Price Quote (CPQ) Management

The Configure Price Quote (CPQ) module enables an organization to offer special pricing and quotes approval mechanisms for partner sales reps, channel reps and channel management team members.



Channel Data Management (CDM)

The Channel Data Management module enables an organization to access point-of-sales data from distributors and resellers to track performance by region, territory, reseller and product, and to proactively manage inventory.

Partner Marketing Management (PMM)

Modules Overview



Search Marketing Management

The Search Marketing Management module provides dynamic linkage between paid ad (Google AdWords, Facebook, etc.) search network and marketing campaigns, and is used for multi-partner inbound integrated lead generation.



Social Syndication Management

The Social Syndication Management module enables an organization to syndicate social media content via the channel partner network. Partners can auto stream or manually customize each social feed for instant or scheduled posting.



Direct Mail Marketing Management

With the Direct Mail module, organizations can create co-branded direct mail templates for partner use in the form of post cards, brochures and other formats. This module can also be connected to national printers for seamless shipping and mailing.



Email Marketing Management

The Email Marketing Management module enables an organization to quickly set up single or multi-touch co-branded emails. These emails create the foundation of various integrated campaigns, whether they lead to microsites, events, syndication or social campaigns.



Microsite & Landing Page Management

The Microsite & Landing Page Management module enables an organization to set up co-branded microsites or landing pages that partners can use to engage their prospects and customers via single-touch or multi-touch digital drip campaigns.



Event Marketing Management

Event Marketing Management enables an organization to set up trigger-ready multi-touch "event in a box" campaigns that can be quickly co-branded and customized, allowing channel partners to engage their prospects/customer base.



Web Syndication Management

Web Syndication Management enables distribution of product and solution web showcases via a partner's website. Web syndication amplifies organizational reach and lead generation through a distributed channel partner network.



Multi-Touch Campaign Management

The Campaign Library module enables channel organizations to provide co-brandable, single- or multi-tactic campaigns to its partner network through a user-friendly, logical interface searchable by keywords and tags.

Partner Incentives Management (PIM)

Modules Overview



Commissions Management

Both internal channel teams and external partners can use the Commission model to align with quarterly programs, campaigns and run rate business to provide sales or referral-based commission tracking. Users can set up business logic with UCM's FlexiFlow™ module.



Market Development Funds (MDF) Management

Market Development Funds Management enables organizations to allocate MDF and co-op funds to partners. It is also used to help partners apply for program funding and claim compensation through proper proof of execution.



Sales Rewards Management

Sales Rewards allows setup of channel sales programs for internal and external users and progress tracking in a unified interface. This module also allows filing of reward claims and stack ranking status. The logic is built with UCM's FlexiFlow™ module.



Rebates Management

With Rebates, organizations can set up company rebates based on specified performance targets and business rules. This makes it easy to develop an application process for partners to establish eligibility for rebate programs and for claiming rebates.



About ZINFI

ZINFI Technologies, the leader in Unified Channel Management (UCM) innovation, enables vendors and their channel partners to achieve profitable growth predictably and rapidly on a worldwide level. Headquartered in Silicon Valley, USA and founded by channel veterans with extensive global channel management experience, we at ZINFI see an immense opportunity to build high-performing sales channels by deploying an easy-to-use, comprehensive Unified Channel Management platform that streamlines and manages the entire partner lifecycle.

ZINFI's Unified Channel Management innovation incorporates three core state-of-the-art SaaS applications—partner relationship management automation, channel marketing management automation and channel sales management automation. In 26 countries, these three core UCM SaaS applications are also locally supported by ZINFI's global marketing services team members.

ZINFI's Unified Channel Management solutions enable organizations selling via the channel to integrate the full spectrum of channel partner management activities—from recruitment, onboarding, training and certification to lead management, co-branded demand generation, sales performance and success, and on to fulfillment and renewal management. Powered by the efficacy and superior experience of ZINFI's UCM solutions, any organization can build a high-performing channel and realize increased partner sales return on investment.

The word ZINFI, to us, means Zero to Infinity—reflecting our mission to enable customers, employees and communities to realize their infinite potentials. In its most applied form in our day-to-day existence, the word refers to an analytical and mathematical approach to marketing and sales methodologies, an approach that allows our customers to realize the true potential of their own products and services and to continuously grow their business via the channel.



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