

## LEAD GENERATION



Leads, Leads Everywhere... How to Pick  
and Build the Right Systems



## You can see from this brief overview, building the right systems requires strategic-level thinking.

Once you have figured out your lead management strategy, structure and staffing plans, it's essential that you have the right systems in place to truly build a world-class lead management program for your channel partners. By "systems," I actually mean three independent things: programs, processes and platforms. I use the plural versions of these words because they need to address every aspect of your channel lead management program, and it is never easy to fit in everything with a singular approach. In this article, we will explore how to best build the right systems for your lead management program.

*// As you think through your lead management strategy, structure and staffing, make sure you have systems in place that will work not only with a relatively low volume of leads, but can also scale (without misalignment) when you drive up your revenue through your partner network on a worldwide basis. //*



In our earlier articles, we discussed how to pick different **strategies, structures** and **staffing** plans based on different types of products, market segments and buying motions. In this article, we will discuss lead management systems in generic terms because, in principle, building programs, processes and platforms is more or less universal. While the specific activities within each program, process or platform is a function of you the markets you serve, the products you sell and the staffing you provide, the approach to building systems is to a great extent the same across all variables.

So let's go ahead and break the concept of "systems" into three core areas and see how we can take the right approach for each:

- 1. Programs** – Building a lead management program requires integration of multiple programs, which determine how you **onboard, train**, enable and **reward** partners. Without figuring out those sub-programs, it is awfully hard to think about **lead management** in isolation. On the other hand, without comprehensive strategy, structure and staffing plans for lead management, you cannot figure out these other related programs. That's why it is essentially to work on an integrated program approach that considers how onboarding, training, enablement, lead management and rewards work together. Once you have aligned these sub-programs with your product types, market segments and partner types, you can then and only then move to the next level of building the right processes.
- 2. Processes** – Lead management requires a clear and focused strategy that specifies which leads you are going to distribute to which partners and why. The strategy should also specify how you will incentive partners to generate leads on their own to drive your sales. We discussed this integrated approach in an **earlier article**, and we also touched upon the dependencies of lead management programs on other sub-areas of channel management—e.g., partner onboarding, training, enablement and rewards. Therefore, when you are building a lead management process and determining how partners will submit leads to you and/or accept leads

from you, you will need to clearly map out approval routing, notifications, alerts, etc. Even today, many companies are still managing these processes manually. That may be okay, at least until you scale to a certain point, but you will need to have the entire process clearly defined, whether or not you automate it.

- 3. Platforms** – As more and more business functions are automated, it makes sense to give channel management the same level of consideration. Forty years ago, enterprises started to automate their back-end processes, like manufacturing, logistics, inventory management and forecasting. This led to a fully automated and integrated financial system, which eventually led to the creation of sales and marketing automation platforms. However, those systems are inadequate for addressing your complex channel management needs, which are likely to change frequently. This is why, when you are investigating technology platforms for managing your channel, it's vital that you understand the implications of taking a customer relationship management (CRM) system and attempting to modify it for the purposes of partner relationship management (PRM). I have shared in **other articles** why PRMs are better fit for channel management than CRMs, so I won't repeat that argument here.

As you can see from this brief overview, building the right systems requires strategic-level thinking, but then micro-alignment across programs, processes and technology platforms in order to build a highly scalable system that is truly frictionless. In my earlier articles on lead management, I used an analogy: Leads are like fish out of water; they can only live so long without being cared for. This is why a fully aligned, frictionless system is critical. Prospects don't wait to buy from you. They follow their own rhythm. We know that great products lose sales because of misaligned systems. Therefore, as you think through your lead management strategy, structure and staffing, make sure you have systems in place that will work not only with a relatively low volume of leads, but can also scale (without misalignment) when you drive up your revenue through your partner network on a worldwide basis.



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