Lead Management in a Post-COVID World

This is a whole new world. While the last 18 months have been horrible for most, the world of lead management will get substantially better.

A lot has changed around the world in all aspects of our life over the past 18 months, and that includes how lead management works in a distributed partner network. Before we delve into what has changed, what will change further and how to prepare for it, let me take a moment to describe what channel lead management is: If you are selling through a channel then you have one or more types of partners, such as resellers, value added resellers (VARs), agents, sub-agents, distributors, wholesalers, affiliates and more. Nearly all of these types of partners have an impact on your sales, either directly or indirectly.

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In general, there are two types of partners:

1. **Transacting partners –** These are the partners who are actually actively selling your products on their website or through their business services. They may or may not provide additional post-sales customer care or services, but most do today because they can get recurring revenue from a sale. Since transacting partners are selling, they will have need to have access to your **lead management system**.

2. **Non-transacting partners –** These are the partners who "refer" or a "send" a prospect to your company via your web site or some sort of a lead management system. These partners tend to be called affiliates, but some of them may also simply be pure service partners. They don't necessarily sell your products, but they nevertheless serve your customer base. Mortgage services companies are great examples of this.

Now, both types of partners will have some form of engagement with a lead management system, and in some cases they will also engage with a **deal registration management** system. (We will not discuss deal registration here; you can find many articles on deal registration on our **website**.)

During the pandemic, as the world coiled back to a quarantine mode, face-to-face engagement has pretty much disappeared or has been curtailed substantially for business transactions. There is no longer a reliable way to generate leads from a "lunch and learn" or from a local fair or some sort of an event. All events have moved online, and therefore generation of leads has also moved online. As a major provider of lead management software, we at ZINFI have seen a rapid rise in demand for the lead management modules we and other software developers provide.

As we get closer to a post-pandemic world, we are very likely to see the evolution of a hybrid world. Physical interactions will not disappear. Humans are tribal in nature and require social face-to-face engagement. We can expect physical events to come back, but they will rely on many of the digital tools we are currently using. It's sort of like this: Instead of having your dinner delivered by Uber Eats, you place the order online but go pick it up yourself. The app will still be there in your life. A similar dynamic will emerge in lead management, where much activity will take place online, but there will still be some space for in-person interaction.

This is great news, because traditionally it has been hard to get channel partners to adopt new software and automate their processes. This fundamental shift towards the adoption of lead management software will ultimately make the channel more efficient and effective. Leads are like fish out of water— if you or your partners are not moving quickly, most of these leads will die. Time is of the essence, and lead management can make lead processing super-fast and accurate.

Finally, once you have an online lead management system in place and you move away from Excel or email- or phone call-based manual tracking, you can monitor all activities online and spend your time focused on driving programs that increase your leads and ROI.

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www.zinfi.com

Contact Us

AMERICAS

sales.noram@zinfitech.com
6200 Stoneridge Mall Road, Suite 300
Pleasanton, CA 94588
United States of America

EUROPE, MIDDLE EAST AND AFRICA

sales.emea@zinfitech.com
Davidson House
Forbury Square, Reading
RG1 3EU, United Kingdom

ASIA PACIFIC

sales.apj@zinfitech.com
3 Temasek Avenue
#21-00 Centennial Tower
Singapore 039190

Australia · China · Hong Kong · India · Indonesia · Japan · Korea · Romania · Singapore · UK · USA