



### the company

Headquartered in the western US, their solutions simplify IT management of desktops, servers and mobile devices, offer real-time change management capabilities and empower enterprises to easily and effectively deliver outstanding support services to both employees and customers.

### the goals

Our client's Marketing Director originally needed a partner that could provide more highly qualified leads to their sales people rather than just more leads. During the implementation phase, they realized we were also capable of managing and nurturing their existing leads and inquiries.

### the intouch solution

Early in the implementation of the program it came to light that each of their sales people had his or her own idea of what a "lead" was. Because they lacked a universal lead definition, they were finding it difficult to measure their lead generation and sales team effectiveness.

To address this, InTouch facilitated a workshop with their sales and marketing leaders to establish a universal lead definition (ULD) and ideal customer profile (ICP). Once the ICP/ULD was published and accepted, InTouch began cold calling for six of their top sales people. Within a few months of testing and tweaking, the program was rolled out to all sales territories.

After an initial six-month teleprospecting phase, InTouch recommended that lead management and lead nurturing capabilities be added to the program. Our client regularly generates thousands of inquires and leads each month from events, their web site and other marketing campaigns, however, there was no process or resources in place to follow-up and qualify the inquires so most of them were being lost, ignored or discarded.

To address the gap in inquiry follow-up, InTouch implemented an inquiry processing program and designed a CRM integration tool that would allow for the seamless transfer of inquiries and leads between their database and our InTouch Direct database. An automated e-mail nurturing tool was also added to ensure that qualified prospects were being effectively nurtured with relevant educational content over the long term.

Once the additional lead management and nurturing tools were in place the client began handing over all of their marketing generated inquires and leads, starting with a six month back log of inquires that had yet to receive follow-up.

### Solutions delivered

- ICP/ULD workshop
- Teleprospecting
- CRM Intergration
- Inquiry processing
- E-mail campaigns
- Content development
- Closed loop feedback
- Automated e-mail nurturing



Once the backlog of inquiries were populated into the InTouch Direct inquiry management system, our callers began converting and qualifying the inquiries. The inquiry management system provides our staff the ability to intelligently and efficiently remove duplicate data and append new information to existing records.

During the qualification process, our callers ask profiling questions in order to sort the records into one of three basic stages: nurturing, not a fit or sales ready leads.

Sales ready leads are automatically assigned to the appropriate sales person through the CRM integration tool and marked for follow-up. Qualified prospects that are interested, but not yet ready to buy are opted-in to the lead nurturing program and added to an automated lead nurturing process.

The InTouch automated nurturing system sends an ordered and timed series of e-mails, regardless of the time they were added to the nurturing process. Different messaging and content tracks are setup by job role and industry to ensure that the series of messages and educational content are relevant to the recipient.

The automated e-mail nurturing process significantly increases efficiency while still retaining the strengths of a personal e-mail message because it comes from the same person the prospect speaks with on the phone.

Appropriate follow-up calls are made at varying intervals as the prospects progress through each nurturing track. All e-mails are sent and received through the system so that all touch points are logged and tracked. This allows our callers to know what information the prospect has received so they can keep their calls timely and relevant. It also allows our callers to immediately respond to any replies coming in from prospects.

Additionally, InTouch has developed over twenty pieces of original content for our client that is being used on the nurturing program and through the automated e-mail nurturing process.

### **the results**

The program started with InTouch supporting six of our client's sales people. After five months, the program expanded and we are now supporting thirty salespeople and four regional field marketers.



## SUCCESS STORY

### IT Solutions-Lead Management

Since beginning the lead management phase of the program, over ten thousand inquires have been successfully processed and qualified to-date. We continue to automatically receive and qualify all new inquires as they are generated.

During the teleprospecting phase, fifteen sales ready leads were being generated each month. Once the lead management and nurturing components were added the number of sales ready lead have grown to sixty per month.

The program has been running consistently for fifteen months and a closed loop feedback process has been established to ensure continued improvements are made each month. The CRM integration has enabled visibility into both databases and weekly conference calls with the regional field marketing managers continues to provide invaluable closed loop feedback that has brought accountability and measurable ROI to the program.