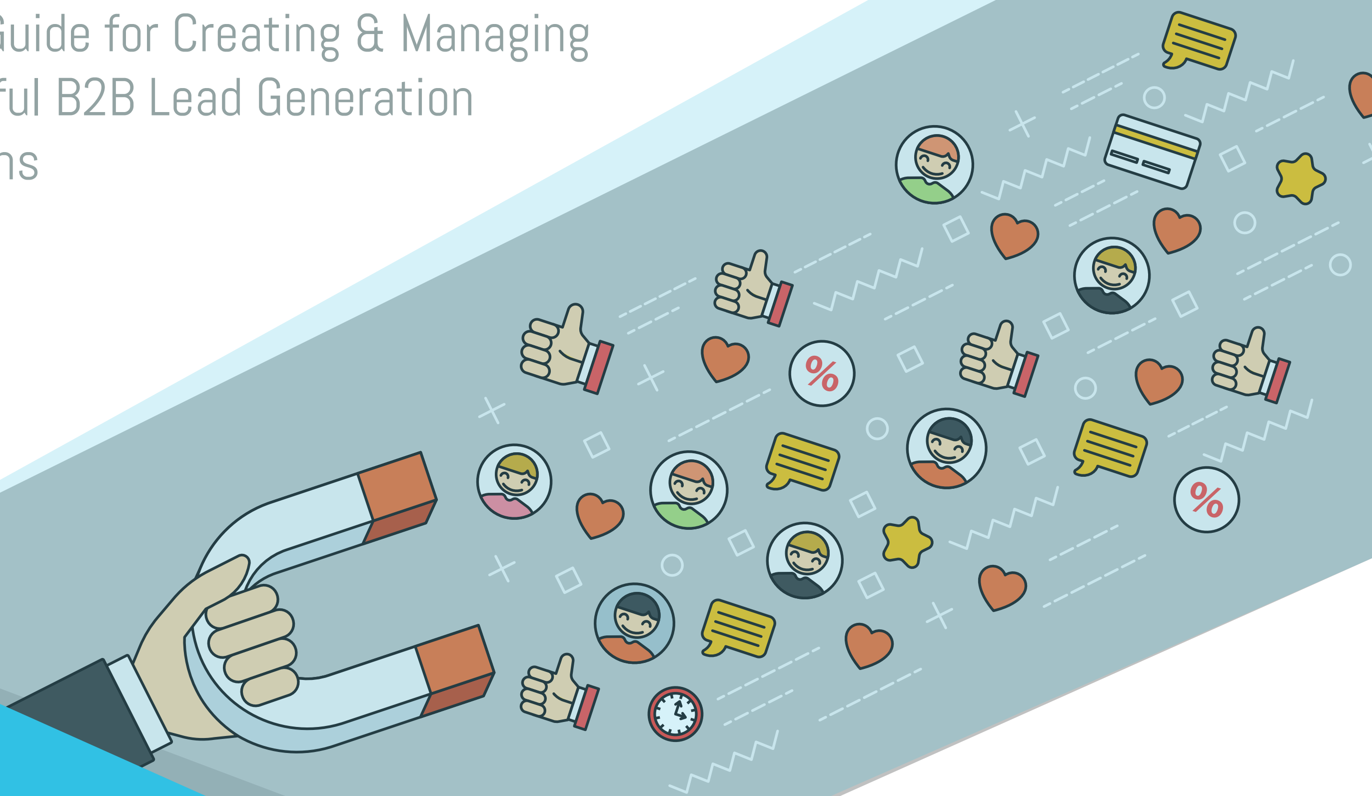
TECHCONNECTR

A Quick Guide for Creating & Managing Successful B2B Lead Generation Campaigns



BY BOB SAMUELS

Introduction

TechConnectr was established in 2017 to provide advice about best practices and solutions for B2B marketers, agencies, and publishers. To that end, TechConnectr provides custom-vetted lead gen solutions plus a soon-to-be-released platform for automated campaign set-up, vendor selection, vendor on-boarding, campaign and lead management, and reporting and analysis processes.

Folow us on

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Principal & Founder @ TechConnectr

Bob creates 'double-mitzvah' win-wins in B2B lead generation by utilizing analytics and strategic relationships. He has a strong background in finance, marketing optimization, and sales enablement.

Before founding TechConnectr, Bob co-founded LosGatos-based NetLine Corporation, a leading digital B2B marketing solution provider, where he oversaw the execution of hundreds of performance marketing programs from a wide range of clients, including Dell, Salesforce, Marketo, Microsoft, and IBM. At QuinStreet and Ziff Davis /Salesify, Bob was responsible for creating and nurturing strategic relationships with a variety of best-in-class data and marketing solution providers. He utilizes his Big-Four accounting and Fortune-500 business acumen to create success for all parties.

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#1 Choose the Best B2B Lead Gen Vendor(s)

How are you going to choose which third-party B2B lead generation solution provider(s) to work with? You will want to do some research or utilize a resource such as the TechConnectr Marketplace to identify best-of-breed solution providers. You will want to consider the following:

- What is the vendor's experience? What relevant lead generation campaigns have they worked on? What recommendations or references do you have regarding their work?
- What is their sweet-spot and their ability to deliver at different intent-levels - MQL, HQL, SQL, CCL, appointments?
- What is the source and segment-ability of their B2B contact data, and, do they have other intent-related information that would help with targeting timing and messaging?
- What is their outreach method(s) (email, telemarketing, social media outreach, programmatic - or a hybrid thereof)? Some methods are better than others, depending on your call-to-action and custom questions.
- What is their level of quality assurance? Do they guarantee accuracy of phone number, email, and demographics? Do they record all conversations and track download activity?

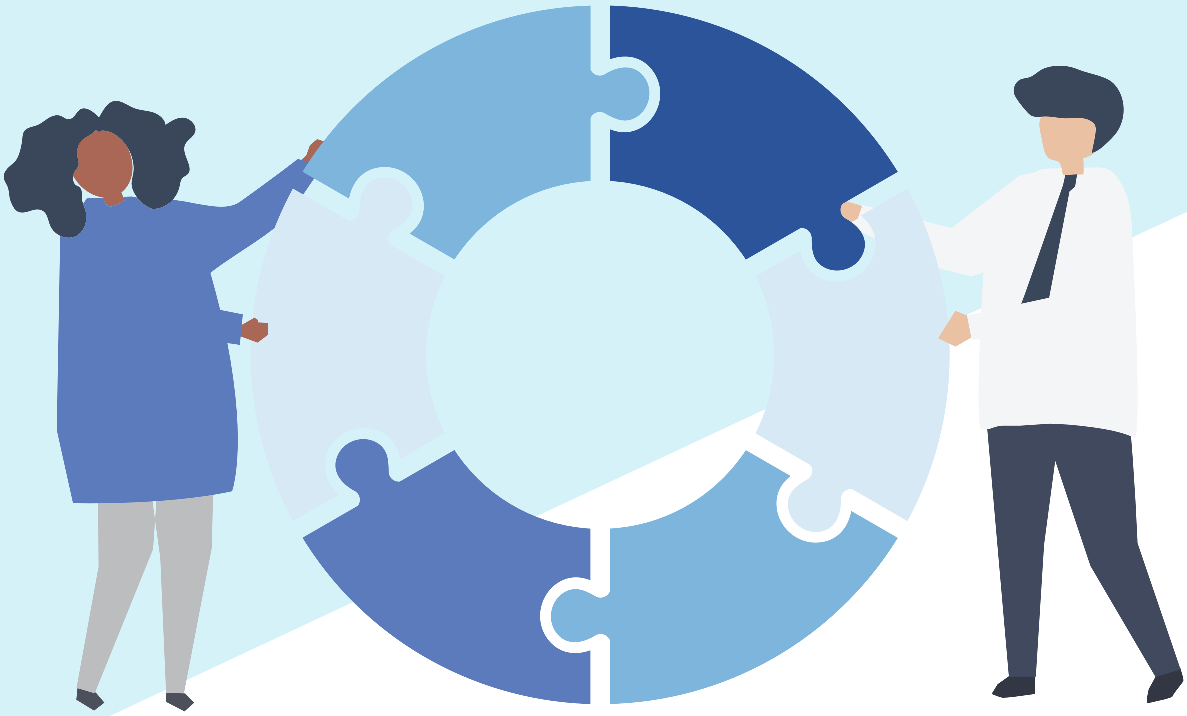
#2 Two B2B Lead Gen Vendors May Be Better than One

You've reviewed and short-listed some quality lead gen solution providers. Now what? You will want to start with a small pilot and you will want to utilize a Campaign Management platform which makes it easy to engage and manage 2-3 vendors per program. The benefits of using multiple vendors vs one are:

- Each solution provider will have their own styles and methods and you will be able to experience and choose the one that works the best for you.

- You will get validation regarding how challenging a campaign is: if you assign it to just one vendor and they don't deliver, you won't know if this is a function of the vendor or of the nature of the campaign (including the challenges and/or goals therein).

- If one vendor falters and is not able to deliver the needed quantity or quality, you can reallocate the remaining quantity to the vendor(s) who perform the best.



#3 On-boarding Your Lead Gen Vendor(s)

You have your approved message copy, target audience identified, and vendor and outreach method selected. Now, how do you plan to on-board these stellar vendors to ensure a smooth and successful lead gen campaign?

- A thorough and complete Statement of Work is the key. It should include a complete understanding of the lead criteria, delivery format and timing, and most importantly, a clear communication of how success will be measured.

- You will want a clean hand-off of the assets, calling script, email messaging, landing page, and suppression & ABM lists.

- You will want to schedule touch-base meetings to enable timely debriefing and adjustments.

- You will want to test and approve all messages, landing pages, and fulfillment files.

- You will benefit greatly from the use of a Campaign Notebook – a “single point of truth” and depository of all shared assets, instructions, questions and responses.

The more complete and thorough the on-boarding process, the smoother your campaigns should go and the better your overall results.

#4 "Campaign Notebook" For Improving Lead Generation Campaign Management

You've got a well-planned 3rd party B2B lead generation campaign and some outstanding vendors identified. During the lead generation vendor selection, on-boarding, and B2B campaign management processes, there is a significant amount of correspondence that takes place between you and your vendor(s). The 2-way communication includes campaign specs, instructions, definitions of success, IOs/SOWs, assets, scripts, lists-sharing, leads delivery, and leads review/acceptance/rejection/queries. If you are like most B2B marketers, this valuable communication historically is all over the place – often embedded in various email strings, Skype, and text strings among various recipients. You may want to consider using a lead generation campaign management platform that includes a "Campaign Notebook" which encapsulates all such communication and asset-sharing. This should reduce the chance of communication errors and save you and your vendors plenty of time over the course of the campaign. You will appreciate this "single-point of truth" - a single depository of all instructions, assets, and other campaign-related communication.

#5 Campaign Management and Optimization

Okay, your campaign has launched successfully. Now, you will want to manage your quality and lead flow. If you followed our tips herein, you would have set up some pause and sync-up meetings with your vendors. More than confirming that the pace is according to plan, you will want to make sure that the leads will be the right people your sales team will want to engage with. Your pause of the program will enable you to get feedback from your sales team that they are pleased with the opportunities presented.

If the quality of the prospects is not ideal, you will want to make necessary tweaks to targeting or messaging. These reviews should be conducted earlier than later so they enable you to have plenty of time to make the necessary changes to optimize the campaign's performance

#6 B2B Lead Gen Validation and Verification Controls

When choosing a B2B Lead Gen Campaign Management platform, you should look for validation and verification checks to ensure your sales team receives the highest quality leads and accurate contact information to prospect.

- Qualification Filters: Controls to review the details of the sales prospect against the MQL requirements or qualifications of an acceptable lead (typically, stated in terms of Geography, Job Function and Level, Industry, and Company Size in terms of either revenue or number of employees)

- Custom Qualifying Criteria: You may choose to ask qualifying questions on your leads registration form, like "Are you planning to buy a new (widget) within the next 12 months?", or "How many users do you have for your CRM system?" for prioritization and routing.

- Validity Checks: You will want to set up validity checks to ensure only leads with acceptable answers are delivered to your sales team for follow-up.

- Duplicates: You may want to set up controls where you either block/don't accept leads you already have in your system, or at least flag such 'duplicates' as they may actually be valuable to you, because they indicate a re-engaged prospect who was previously dormant.

- Suppressions: You should already have a 'suppression list' of people who have asked not to be contacted by your company. Plus, if you haven't done so already, you should create a suppression list of the domains of all of your competitors, so you don't inadvertently promote your offers to competitors. Both lists should be scrubbed against prior to the outreach, to make sure these people are never contacted.

- ABM List: ABM (Account-Based Marketing) is a hot tactic these days. It's an old concept (previously called 'named accounts' or 'target accounts') but a refreshed tactic to target high value prospects in a stronger and more focused manner. This list should be utilized in

- Creating your outreach list and checked again on the back end to make sure only key decision makers from these target companies are accepted as leads.

- Field Validation Checks: You should have edit checks in place in your campaign platform to ensure the syntax of the data in key fields is accurate (e.g.: numbers in phone and zip fields; .com and @ in email fields, etc.)

- Verification Checks: These are a bit trickier to execute but are important nonetheless. They may need to be done within your campaign's platform with 3rd-party add-in programs or outside of your system in a manual check.

    - Email: Programs you should consider include 3rd party products such as BriteVerify, KickBox, or NeverBounce. These will help verify whether or not you are only paying for leads with deliverable email addresses.

    - Phone Number: You can use a 3rd-party product such as Twilio to check the validity of phone numbers. Or, you can check against the phone numbers maintained by large data providers such as ZoomInfo. The most accurate, but most costly approach would be to hire an outside firm to human-verify the phone numbers. This still may be worthwhile, considering the value and cost-savings it will lead to, if your sales team has 100% accurate data.

    - Other Demographic Information. Like phone number, other details like job function and title, company, company size, etc. should also be verified; this verification too can be outsourced. This expense could be worthwhile, again, when considering the value to the sales team to have reliable data from which to assign, prioritize and prospect to.

B2B Lead Generation Marketplace

of and for best-of-breed B2B marketers, agencies, publishers, and b2b lead generation solution providers

Thank You

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