GET MORE FROM YOUR LEADS
GET SALES LEADS WORTH FIGHTING OVER – WITHOUT THE FIGHT.
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As you may have noticed, the style of this e-book is inspired by the great outdoors and U.S. National Parks. Why? Because they express a feeling of fun, adventure, and exploration — and Salesforce is all about empowering people to blaze their own trails and be part of something greater. Pretty cool, huh?

If you want to know more, check out Trailhead, the fun way to learn about Salesforce. Get started today at salesforce.com/trailhead.

MEET ASTRO AND FRIENDS
INTRODUCTION

If you’re in business-to-business (B2B) sales, you likely have one overarching goal: Acquire new customers. Leads are your starting point, your currency, your ticket to success. You should look upon them with delight. Yet the majority of sales reps and managers have a love-hate relationship with leads. How did that happen?

It happens because sales and marketing, when it comes to leads, have different measures for success. Marketing is rewarded for lead quantity, while sales wants quality leads to convert into paying customers. The result is a complex, and sometimes tense, lead-management process, with sales and marketing often at odds over who should get credit.

But where is the customer in all of this? What if you could aim for the right quantity of leads and improve their quality and management at the same time, all while giving your customers a better buying experience?

Keep reading to learn how to get more from every lead that enters your pipeline by routing them effectively and measuring them every step of the way to becoming happy customers.
Let’s start from scratch and define lead. To connect with potential buyers, companies use marketing and business development tactics that generate awareness and stimulate interest.

When those tactics work, potential buyers respond by sharing information. Gain a person’s name, location, and contact info, and you have a strong indication they want to talk.

**Congratulations:** You now have a basic lead. Go ahead and start the conversation via marketing communication or outreach from a sales representative.
CHAPTER 1: THE STATE OF LEAD GENERATION

IT’S A DIFFICULT DANCE.
Unfortunately, this interplay between sellers and buyers has become increasingly complex. Buyers are aware of your desire to make them a lead you can sell to. So marketing and sales teams focus on value-exchange tactics: You offer customers something valuable – content, trials, consultations, and so on – and prospects reciprocate with their information. But even those tactics can make buyers wary. As time goes on, generating quality leads in this way becomes increasingly difficult.

NOT ALL LEADS ARE CREATED EQUAL.
In a recent study by IDG, 61% of marketers reported that generating high-quality leads was hard for their organization. In fact, according to Gleanster Research, only one-quarter of leads in a given sales pipeline are legitimate prospects.

Even when leads make it into the system, data is often missing or questionable. A recent eMarketer study revealed that the majority of U.S. B2B marketing executives say over 25% of their marketing database contains old, inaccurate, unusable, or duplicate leads.

For the portion of leads that contain usable data, companies struggle to make the most of them. InsideSales found that only about 27% of leads ever get contacted and the average response time is over 61 hours. In today’s world of immediate solutions, customers expect quick and personalized responses from salespeople or they’re going to buy elsewhere.

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InsideSales
Fixing these many challenges requires a big-picture response. To grow faster and sell smarter, sales teams need to focus on improving the entire lead process at every stage, including:

- Prospecting
- Data enrichment
- Routing and scoring
- Qualification
- Tracking
- Conversion
- Measurement

In the next three chapters, we’ll dive into these challenges and their solutions. You’ll learn best practices and technology tips for sourcing quality leads and improving the ways you manage them – which helps you ultimately build better, stronger relationships with customers.
CHAPTER 2: QUALITY, QUANTITY, OR BOTH?

Marketing, sales development, and other lead generators often feel they must compromise lead quality to coax potential customers into giving up information, even if the information given isn’t enough for a sales rep to act on. Clearly, quality leads are the end goal. But what comprises a quality lead, and do companies have to sacrifice quality for quantity?
Usable leads boil down to complete and accurate data. Considering where most leads come from, reaching that standard can be a hefty challenge. Ask yourself: **How do leads make their way into your pipeline?**

- What portion of your leads come from web forms with manually entered information from sales-averse window shoppers?
- How many leads come from marketing tactics like event lists, lead programs, webinars, or third-party lists?
- Are your reps scouring social networks like LinkedIn, collecting business cards, or using personal contact lists to enter data into your CRM?

No matter the method, most of these sources suffer from data deficiencies. To be clear, we aren’t recommending you scrap any of these lead-generation efforts. But we do think you can improve quality, simplify management, and discover new, valuable sources for top-notch leads. Here’s how to get started.

**First, enrich leads with trusted data.** To boost conversion rates, marketers limit the amount of information they ask for. Yet effective lead development can only be done with a solid foundation of contact and company information. In B2B scenarios, contact data helps you connect with the right buyers and stakeholders, while account data helps ensure the connection is worth making. It’s not easy to resolve this tension. Some companies rely on data stewards, sales ops, or others to manually research, score, and enrich records. But that takes far too much of your time and resources, considering the power of today’s technology to connect, match to, and automatically compare and enrich your leads.

**Next, use the data in your system to uncover opportunities you might have otherwise ignored.** To find good leads, you need a solid understanding of the attributes of existing customers. With this foundation, you’ll more easily recognize good leads and which verticals/industries, competitors, or other areas will be best for your lead development.

Many B2B companies find major value in exploring corporate relationships or hierarchies. You can find white space in the corporate family tree that represents parents, subsidiaries, and sister companies of accounts where you’ve already had success. Even better, you can expand relationships within corporate families to grow revenue, cross-sell, upsell, and extend partnerships.
CHAPTER 2: QUALITY, QUANTITY, OR BOTH?

LIGHTNING DATA HELPS YOU GET MORE, BETTER LEADS

So far we’ve been talking in general about better approaches to lead management. But if you are already a Salesforce customer, you have some amazing tools you might not be aware of that give you a huge head start. If you’re not a customer, we’re confident that the value these tools promise will convince you to partner with us.

Lightning Data is the new way to get third-party data natively integrated into Salesforce. You can choose the best data source for your business the same way you add other apps from AppExchange. You can automatically enrich and update lead data based on matches to that data source, whether your leads are imported from your marketing-automation system, manually entered, or input another way.

Lightning Data apps also give you the tools to search for and add new target accounts – with complete business information and insights – directly into Salesforce. Eliminate the bad data that comes with manual entry by adding new prospect accounts with complete and standardized information, right inside Sales Cloud. Many data partners also offer data to organize and distinguish accounts by hierarchies and corporate families, so you can more strategically target white space and expand relationships.

FIND LIGHTNING DATA APPS »
CHAPTER 3: TRACKING LEADS FROM CLICK TO CLOSE

Getting leads into your system and improving the data is a crucial first step. Just by improving lead quality, you’ll start to see a measurable impact on your funnel. But there are even bigger rewards for making improvements across your lead pipeline.

A high-functioning lead-management system helps you in four important ways:

• Reduce the amount of time to follow-up, improving your chances of contact and conversion
• Make better use of reps’ time and help them prioritize the best opportunities
• Prevent leads from falling through the cracks, which wastes your time and resource investments
• Provide an optimal buying experience for potential customers with better-informed reps
A successful lead-management system covers every stage of the buying cycle, giving your reps a powerful and persistent advantage in converting those leads into happy customers. Once you begin tracking your leads from initial click all the way to close, each of these five selling phases will flow naturally to the next:

1. Get the lead to the right person quickly.
2. Prioritize and manage the lead queue.
3. Give reps easy access to relevant data.
4. Provide guidance and reminders for next steps.
5. Make it easy to convert or move to the next stage.

With a single, consistent view of data across the buying cycle you build momentum into your sales process, accelerating every rep’s sales motion.

Over 71% of successful companies cite lead scoring as most responsible for improving revenue contribution.

The Lenskold and Pedowitz Groups
CHAPTER 3: TRACKING LEADS FROM CLICK TO CLOSE

CONVERTING MORE LEADS TO OPPORTUNITIES WITH SALES CLOUD AND PARDOT

So how can you make sure every step of the process is covered? With Sales Cloud and Pardot, you gain access to automatic lead scoring and routing. Reps gain a helping hand to reach the hottest leads first, and your process gets a new set of guard rails to keep every lead in play and on track.

The main Leads page in Sales Cloud Lightning puts you in charge of tracking and prioritizing leads. See all the leads assigned to you or create custom views for easy management. Sort, filter, and use powerful charts to better visualize and single out the most important leads. It’s all just a few clicks away.

The Lead Record page in Sales Cloud is your command center for making the most of each opportunity. Scan activity history, easily log new activity, and create tasks with reminders. Dial up information on campaigns or other interactions with the lead. Use Sales Path to easily manage the conversion process, or use the kanban view to drag and drop leads and watch the totals automatically recalculate.

Want to see how your lead has interacted with your marketing assets like emails, webinars, and e-books? Add the Engagement History Lightning Component from Pardot to the Lead Record page in Sales Cloud and you’ll be able to personalize conversations, target hand raisers, and drive conversions.

LEARN MORE ABOUT SALES CLOUD »

LEARN MORE ABOUT PARDOT »
CHAPTER 4: MEASURING SUCCESS

Whether you’re a sales manager, marketer, sales rep, or in another lead-reliant role, you need data to better manage and prioritize leads – and ultimately measure your success. Only by closely monitoring lead metrics and activities can you see what’s working and what’s not. Let’s break this down by role.
CHAPTER 4: MEASURING SUCCESS

SALES MANAGEMENT AND MARKETING

With a better handle on your key-performance indicators, you’re poised to quickly and accurately address problems, forecast pipeline, and prove success. Can you easily check your team’s numbers on closed/won business, expected to close, forecast, quota, and more? Maybe it’s because you’re missing critical information about your lead-generation or sales process.

Important strategic questions can be hard to answer when data on leads and prospects lives across a variety of systems and formats. Do you have the information on hand to consistently answer these questions:

- Who is my next big customer and which segments should we target?
- Which existing line of business should we grow?
- How are pipeline channels performing compared to previous months/quarters/years?

INDIVIDUAL SELLERS

As a sales rep or account executive your main goal is closing more deals. You can get there faster by regularly tracking your own lead and prospect pipeline and adjusting your daily work accordingly. But you’ll need to prioritize the right leads based on their key attributes, probability of closing, or recent activity. If you don’t have that data available to you, demand it.

The same is true for sales meetings. You need relevant details about the customer before you can walk in the door armed with specific next steps or recommendations. With a 360-degree view of your lead – ranging from information about their company to their latest social media posts – you’ll know how to make every interaction a step forward.

MEASURE YOUR LEAD PIPELINE WITH SALESFORCE

With Sales Cloud Lightning, customizing reports is easy and intuitive, through stunning charts and graphs. You can create sophisticated reports and dashboards without bugging IT or your CRM administrator. Track team and individual performance, and monitor every stage of the pipeline in real time to prevent leads from going bad. And with all these reports and dashboards on your mobile phone – thanks to Salesforce for iOS and Android – you can make critical decisions anywhere.
CONCLUSION

Leads can be tricky, but they don’t have to be. Sales and marketing both love leads, but hate how they end up on opposite sides of the quality versus quantity debate. At Salesforce we’ve learned a simple way to solve this and other issues around leads: Align around the buyer’s experience. Use your customer as the guide for how you find, convert, track, and close leads. Then everyone will be happy because there will be more than enough success to go around.

Salesforce technology helps make it possible to have more and better leads by focusing on the customer experience. Start by improving lead quality and looking for leads in new places. Then score and route those leads efficiently and accurately, guiding reps to the best potential customers and through the steps to move the lead through the pipeline. Finally, measure and optimize your lead pipeline in real time with dashboards.

For more on how it works, check out a guided tour of Sales Cloud.

RESOURCES YOU MIGHT ALSO LIKE:

- The 5 Productivity Secrets of Successful Salespeople
  - GET THE E-BOOK

- Learn About Pardot on Trailhead
  - LEARN MORE

- Get a Free Trial
  - TRY FOR FREE