SPECIAL REPORT

A Strategic Approach to Lead Scoring and Nurturing

Applying lead scoring and nurturing strategies to impact sales pipeline performance

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THE IMPORTANCE OF LEAD SCORING AND NURTURING

B2B buying processes have changed for good. Today's B2B buyer prefers to educate themselves on a product or solution with the ocean of information readily available to them online before they engage with Sales. Peer recommendations and opinions are highly valued, and messaging that comes directly from companies is received with more skepticism than ever before.

Because of this monumental shift, B2B marketers have been forced to adapt their strategies in order to effectively convert modern prospects into buyers. Content is currency to convert leads, and thought-leadership is critical to build trust.

The first shift began with the Internet, then search engines, then most recently social media sites. Organizations were forced to adapt their lead generation tactics in order to "be found" by their prospects via these channels.

INBOUND MARKETING TACTICS INCREASINGLY GAINING TRACTION IN FACILITATING LEAD GENERATION

Inbound marketing tactics have served as an excellent tool for B2B marketers to generate leads. Through search engine optimization, pay-per-click and social media, organizations increase the visibility of their company websites and content to prospects who are researching solutions online.

Special Reports

Special reports provide data and insights specific to an industry or demographic segment contained in our research results, for comparing an organization's performance and practices against industry benchmarks, and for supporting the strategic planning and decision-making of senior marketing executives.

What's great about inbound marketing tactics is they can help organizations generate a high volume of leads at a lower price point than most traditional marketing tactics. One of the greatest challenges for B2B marketers happens after the lead conversion point. How do organizations know in what stage of the buying cycle these leads currently reside? Are they interested in engaging with Sales, or are they still in the research phase? If it's the latter, reaching out with Sales contact could potentially ruin the lead by turning them off too early. Organizations must identify sales-ready leads in order to protect their lead generation investments, and fuel sales pipelines that lead to overall success.

LEAD QUALIFICATION REMAINS A PERTINENT CHALLENGE

Since consumers have been empowered with information, we must act on their terms. Before we can do this, we must identify what those terms are. Engage Sales with a lead too early, and you will likely lose them. Wait too long, and one of your competitors may snatch them up. B2B marketers have a short window of opportunity to engage leads with Sales at the right time.

It is likely that the majority of leads generated are not ready to engage with Sales, and require nurturing with great thought-leadership content until the point where they are ready to engage. A premier challenge lies in identifying which leads are ready to engage, and then establishing scoring methodologies that accurately flag leads that meet the criteria.

B2B ORGANIZATIONS MUST ADAPT

Achieving success in this new environment requires B2B organizations to adapt from traditional marketing plans and principles, and embrace the changes that are occurring in the market. The modern B2B marketer must adopt a consumer-centric mindset, to ensure excellence in all content and communications with those consumers.

In this Special Report, we will examine key industry trends in lead generation. We will also dive into the various lead scoring and nurturing strategies that B2B organizations are applying in order to protect marketing investments, impact sales pipeline performance and succeed in this new environment. Finally, you will receive recommended actions and CMO perspectives on lead scoring and nurturing strategies.

THE GROWING ADOPTION OF INBOUND MARKETING TACTICS

Inbound marketing tactics have served as an excellent solution for helping B2B marketers solve the challenge of generating a high volume of leads. The effectiveness of various B2B marketing tactics, including inbound and outbound tactics, is shown in the following chart.

CHART: B2B MARKETERS FIND INBOUND MARKETING TACTICS HIGHLY EFFECTIVE
Q. Please indicate the effectiveness of the following marketing tactics for your organization.
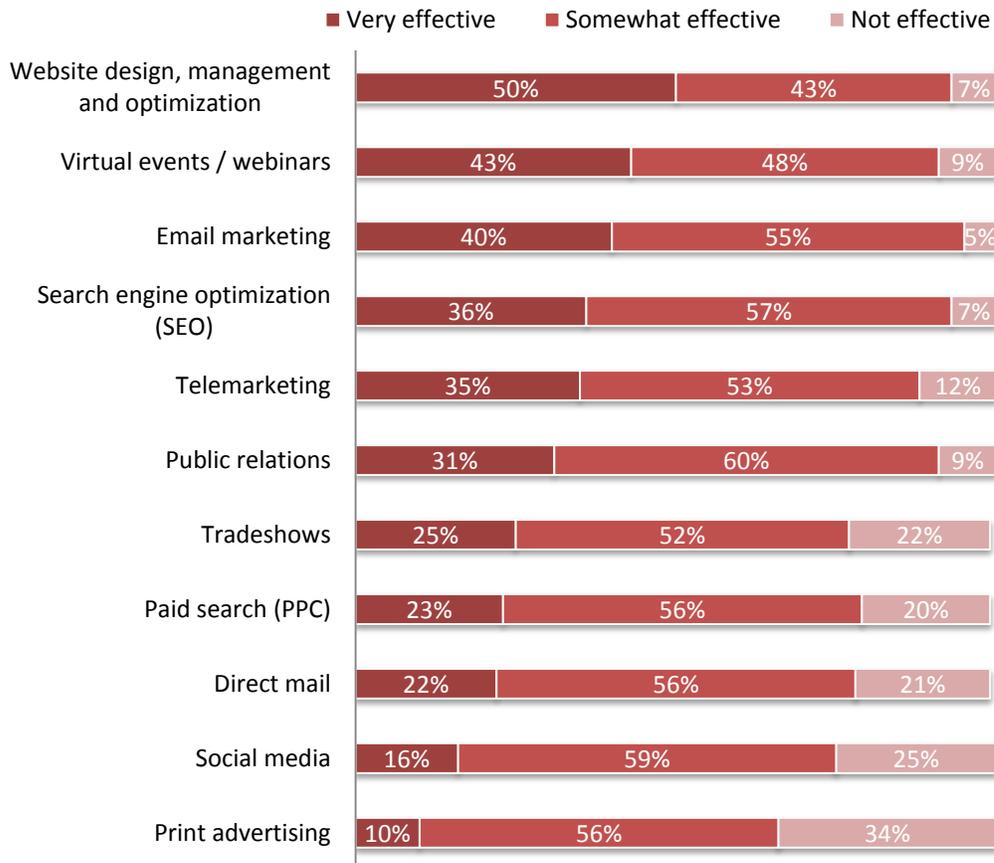
Tactic	■ Very effective	■ Somewhat effective	■ Not effective
Website design, management and optimization	50%	43%	7%
Virtual events / webinars	43%	48%	9%
Email marketing	40%	55%	5%
Search engine optimization (SEO)	36%	57%	7%
Telemarketing	35%	53%	12%
Public relations	31%	60%	9%
Tradeshows	25%	52%	22%
Paid search (PPC)	23%	56%	20%
Direct mail	22%	56%	21%
Social media	16%	59%	25%
Print advertising	10%	56%	34%

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Source: ©2011 MarketingSherpa B2B Marketing Benchmark Survey
Methodology: Fielded Aug 2010, N=935

The growing trend of utilizing inbound marketing tactics is demonstrated by the previous chart on the effectiveness of marketing tactics, where the top two tactics are inbound and two of the three least effective tactics are outbound.

Webinars and virtual events have been rated as a highly effective tactic, second only to website design, management and optimization. Webinars provide an excellent platform for organizations to showcase thought-leadership status. This tactic builds trust and generates leads. Webinars also tend to be highly cost effective.

Social media is undervalued in terms of effectiveness. This is likely a result of the infancy of the marketing tactic, and the low level of experience organizations have in execution when compared to more seasoned marketing tactics. As B2B marketers become more mature with their social marketing practices, perceptions on the effectiveness of this tactic will improve.

"We are a small company with limited resources and budget. As a result, SEO, PPC advertising, press releases, and email marketing have had the greatest impact for our organization."

-Company CMO

The following chart further demonstrates the growing popularity of inbound marketing tactics, and examines planned budgetary changes of B2B marketers for 2011.

CHART: B2B MARKETERS INCREASING INVESTMENTS IN INBOUND MARKETING TACTICS
Q. Please select the statement that best describes how you expect your organization's budgets will change for the following categories in 2011.
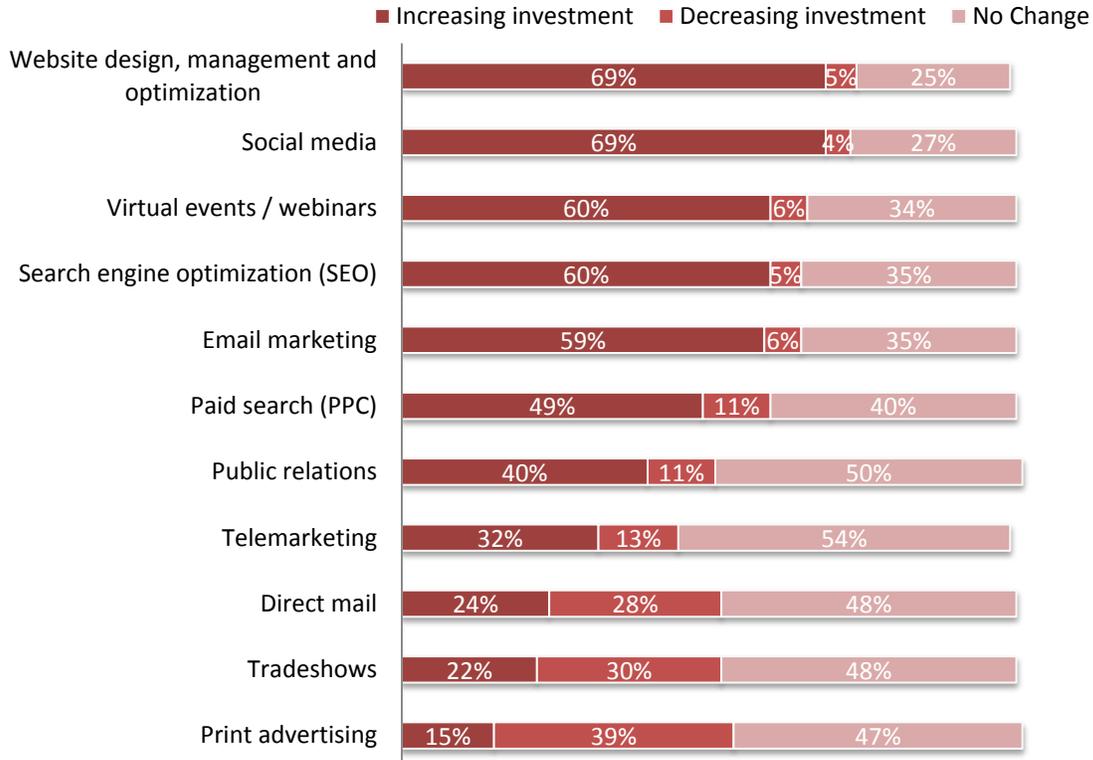
■ Increasing investment   ■ Decreasing investment   ■ No Change

Category	Increasing investment	Decreasing investment	No Change
Website design, management and optimization	69%	5%	25%
Social media	69%	4%	27%
Virtual events / webinars	60%	6%	34%
Search engine optimization (SEO)	60%	5%	35%
Email marketing	59%	6%	35%
Paid search (PPC)	49%	11%	40%
Public relations	40%	11%	50%
Telemarketing	32%	13%	54%
Direct mail	24%	28%	48%
Tradeshows	22%	30%	48%
Print advertising	15%	39%	47%

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Source: ©2011 MarketingSherpa B2B Marketing Benchmark Survey
Methodology: Fielded Aug 2010, N=935

The majority of B2B organizations are increasing their marketing budgets for inbound marketing tactics including social media, virtual events and webinars, and SEO. When considering outbound marketing tactics such as direct mail, trade shows and print advertising, the majority of organizations are either not changing or actually decreasing their budgets.

Website design, management and optimization will continue to have great importance as inbound marketing tactics continue to gain momentum. Inbound marketing tactics are tools that drive traffic back to company websites where leads can convert. As organizations continue to rely on inbound marketing tactics for lead generation, making the most of inbound traffic becomes increasingly important. Even marginal gains in website conversion rates can lead to significant results in lead generation and sales pipeline development.

Of all the tactics at a B2B marketer's disposal, print advertising has taken the biggest hit. Nearly 40 percent of organizations indicated they would be decreasing their spend in this channel. This channel was also rated as the least effective B2B marketing tactic, likely because it tends to be low in consumer centricity.

Email marketing has a strong showing. A traditional use of email marketing includes list rental and highly self-promotional content, but this channel has evolved to take a more consumer-centric approach. For example, emailing a house list can be considered an inbound activity. Subscribers have opted in and asked for content from the organization. Email messages can be automatically triggered as a result of an action taken by the lead to better meet consumer content preference and timing of delivery.

What's important for B2B CMOs to conceptualize is that a dramatic shift from outbound activities to all inbound activities can be damaging to results. Organizations need to identify an effective mix of consumer-centric marketing activities that produce results for their brands. This commonly will include a mix of both inbound and outbound activities.

"Inbound leads (those contacting us with an express need) vs. outbound leads (those generated from our marketing and lead generation campaigns) have very different time frames. Inbound leads generally are generally short-term leads, while outbound generated ones fill the pipeline with long-term leads. We like to have a good mix of both as we forecast future growth."

-Company CMO

When applying outbound marketing techniques in this new environment, organizations will need to adapt their campaigns to be as consumer-centric as possible. For example, by identifying buyer personas and applying sophisticated segmentation techniques, the relevance of direct mail campaigns, and the results achieved from them, can be vastly improved.

The growing trend of utilizing inbound marketing tactics is a result of the cost effectiveness of these marketing channels, the ability for marketers to generate a high volume of leads, and the evolving buyer becoming more resistant to traditional marketing campaigns. Once the leads are generated from any channel, the challenge of lead quality must be addressed.

LEAD QUALITY REMAINS A TREMENDOUS BARRIER TO B2B MARKETING SUCCESS

Traditionally, all inquiries or leads generated from marketing campaigns went directly to Sales. All information about the company generally came directly from the company, and consumers engaged with Sales early in the process. While this model may have proved to be effective in the past, we now need to take each stage of the buying cycle into consideration. Consumers have easy access to much of the information they need, and reaching out with Sales contact too early can decrease the likelihood of closing the deal. In order to get Sales involved with prospects at the right time, lead qualification and scoring processes must be executed.

Establishing lead qualification and scoring processes is a daunting, yet necessary task. When this practice is neglected, organizations face lost marketing investments and frustrated, less efficient sales teams, which ultimately prevent organizations from reaching their full revenue potential.

The B2B marketer faces numerous hurdles in building a lead qualification and scoring campaign, including gaining company support and adoption, Sales and Marketing alignment, strategic development and roll-out, technology adoption and process refinement and optimization.

The following chart presents the average percentage of qualified, sales-ready leads out of all inquiries or leads generated from marketing campaigns. It also shows average percentages of qualified, sales-ready leads by average deal size.

CHART: CONVERSION RATE OF LEAD INQUIRIES TO QUALIFIED LEADS BY AVERAGE SALE AMOUNT
Q. Please indicate your organization's approximate conversion rate of all lead inquiries to qualified, sales-ready leads.
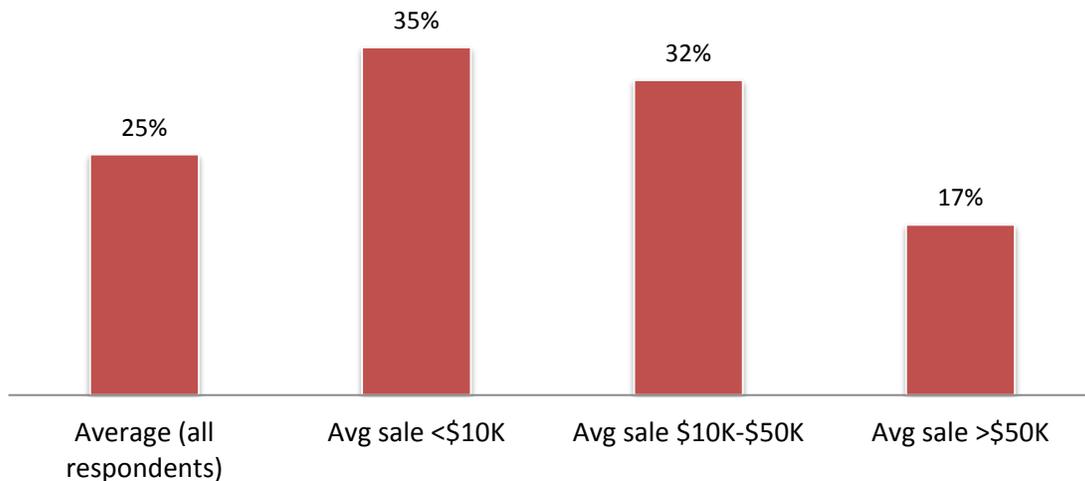
Source: ©2011 MarketingSherpa B2B Marketing Benchmark Survey
Methodology: Fielded Aug 2010, N=935

The above chart shows the conversion rate of inquiries to qualified, sales-ready leads by an organization's average sale amount or deal size. For example, if a B2B organization's average deal size is less than $10,000, then approximately 35 percent of the inquiries they receive – either through their website, a direct response card or a call – are actually qualified, sales-ready leads at the time of conversion.

Overall, only one out of four lead inquiries generated from marketing campaigns are qualified and ready to engage with Sales. Consider the potential negative impact of delivering a flow of leads directly to Sales in which 75 percent of them are not ready to engage.

As average deal size increases, there is a decline in conversion rates of inquiries to qualified, sales-ready leads. Companies that have greater deal sizes tend to also have greater lead qualification criteria, such as an ample budget. Additionally, consumers researching purchasing decisions with large price tags may linger in the research phase longer than those researching lower ticket items.

To avoid delivering a lead flow to Sales that is, on average, 75 percent unqualified, CMOs need to embrace lead qualification and scoring strategies. As demonstrated in the following chart, improvement is needed in this area.

CHART: CMOs INDICATE LOW-BARRIER LEAD QUALIFICATION
Q. What information is required before a lead is passed to sales?
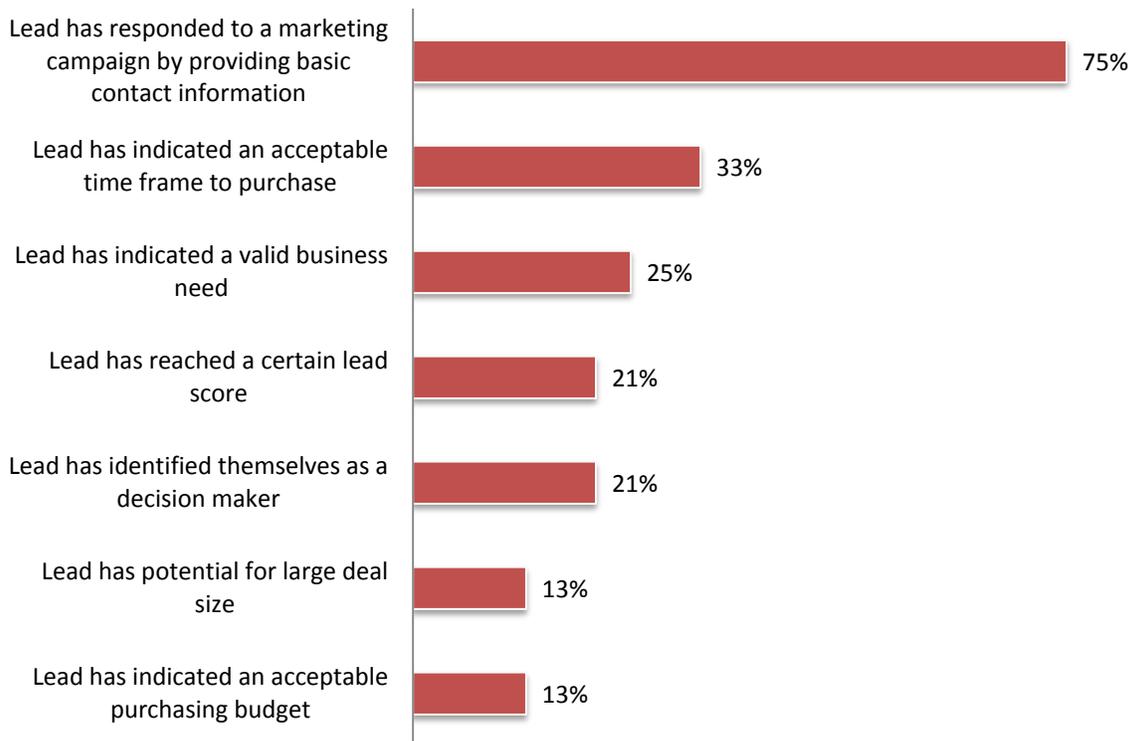
Category	Percentage
Lead has responded to a marketing campaign by providing basic contact information	75%
Lead has indicated an acceptable time frame to purchase	33%
Lead has indicated a valid business need	25%
Lead has reached a certain lead score	21%
Lead has identified themselves as a decision maker	21%
Lead has potential for large deal size	13%
Lead has indicated an acceptable purchasing budget	13%

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Source: ©2011 MarketingSherpa B2B Marketing Benchmark Survey
Methodology: Fielded Aug 2010, CMO N=297

The most popular selection, "lead has responded to a marketing campaign by providing basic contact information," is a given. A lead is not qualified unless Sales has a means of contacting and communicating with them. Surprisingly, 25 percent of CMOs do not verify even the most basic information before passing the lead to Sales. How many times have you seen the lead "Mickey Mouse" or "John Doe" show up in your database? Clearly, these are not qualified, sales-ready leads.

After contact information, the next criterion that is most likely to be considered is the indication of an acceptable timeframe to purchase, which 33 percent of CMOs indicated using. This can be an excellent indicator of buying cycle stage, which is why it is the most commonly used criterion next to contact information.

For the remainder of the criteria, no more than 25 percent of CMOs indicated use. The criterion that may cause the greatest detriment when neglected is the lead's indication of a valid business need for a solution. Yet, 75 percent of CMOs are not verifying this need prior to handing a lead off to Sales.

Adopting marketing automation technology is the first step for applying the sophisticated lead scoring and nurturing strategies that are necessary to convert modern B2B prospects into buyers. The following section examines the level of CMO adoption for these technologies.

INDICATIONS OF LEAD SCORING AND NURTURING ADOPTION

While improvement may be needed in lead scoring strategies, it is encouraging to see the indications CMOs have made on the implementation of marketing automation software. The following chart demonstrates their level of adoption.

CHART: CMOS INDICATE ADOPTION OF MARKETING AUTOMATION
Q. Please select the statement that best describes the status of your organization's implementation of marketing automation software.
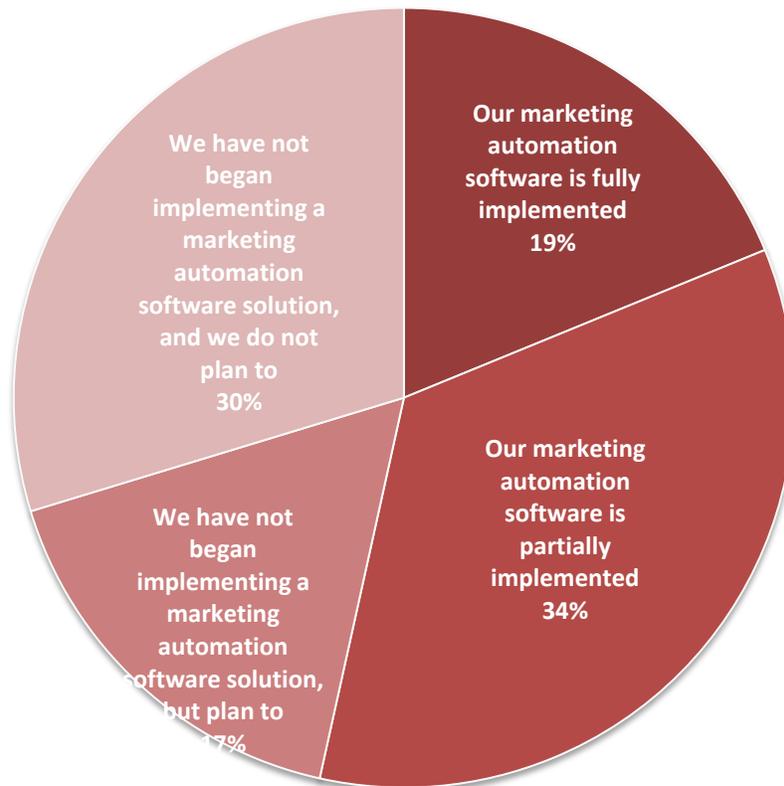
Source: ©2011 MarketingSherpa B2B Marketing Benchmark Survey
Methodology: Fielded Aug 2010, CMO N=297

Marketing automation software has become a popular component for solving lead quality challenges. These applications ensure consistent and precise execution of lead scoring, nurturing and management processes. A healthy 53 percent of CMOs either indicated their marketing automation software is fully or partially implemented. Another 17 percent of CMOs indicated that they had plans to implement a marketing automation software solution.

Simple lead scoring and nurturing methodologies do not require automation. But, to effectively identify qualified leads and nurture non-qualified leads, sophisticated strategies are necessary. CMOs must become highly process-oriented, and conceptualize the buying experience for multiple profiles or buyer personas in different stages of the buying cycle. Once an organization adds a number of criteria to their lead scoring campaigns and multiple lead nurturing drip campaigns, it becomes virtually impossible to execute them in a human manner. Additionally, many marketing automation software solutions enable CMOs to score leads in real time, based on the actions taken on a company website, through email marketing campaigns, etc. as they are happening.

Marketing automation software can be an extremely effective tool in facilitating lead nurturing and management processes. These applications automatically and effectively execute lead qualification and scoring strategies and the deployment of lead nurturing messages based on the user's criteria. These applications can also automate the distribution of sales-ready leads to the Sales team.

In order to receive the greatest benefits from marketing automation, organizations need to take a strategic approach to defining lead qualification, scoring, nurturing and management processes prior to implementation, and then gain executive buy-in for roll out. These very well may be the most difficult steps for many CMOs.

"We are a very small company. For us - the biggest step is the recognition of what we would like to be doing with formal lead nurturing and getting executive commitment."

-Company CMO

Before a CMO can gain executive commitment, it is vital to gain support from Sales. If there are alignment issues between Marketing and Sales, this can be even more challenging. Fortunately, collaboration with Sales lets the team know that their need for qualified leads is a priority to Marketing, which can be an effective first step in bridging the gap.

The next section analyzes the top lead scoring and nurturing strategies B2B organizations are using to identify qualified leads, and nurture non-qualified leads until they are ready to engage with Sales.

TOP STRATEGIES IN LEAD SCORING AND NURTURING

Now that we have an understanding of the importance of lead scoring and nurturing, let's examine the top strategies for each of these tactics. Along with these strategies, this section also includes a case briefing on how lead scoring and nurturing can influence company revenues.

WHAT MAKES THE GRADE? DETERMINING LEAD SCORING CRITERIA

Without a strategic approach to lead scoring, campaigns will struggle for effectiveness. Key components of this strategy include identifying a clear definition of a qualified, sales-ready lead and then ensuring the definition is agreed upon by Marketing and Sales. Once the definition is established, teams must develop and test a lead scoring methodology that will accurately and precisely identify leads that meet the established criteria.

The following chart shows the various criteria that organizations use in their lead scoring methodologies.

CHART: BALANCING DEMOGRAPHICS AND BEHAVIORAL CHARACTERISTICS FOR EFFECTIVE LEAD SCORING
Q. What actions or traits are currently considered in your lead scoring calculation?
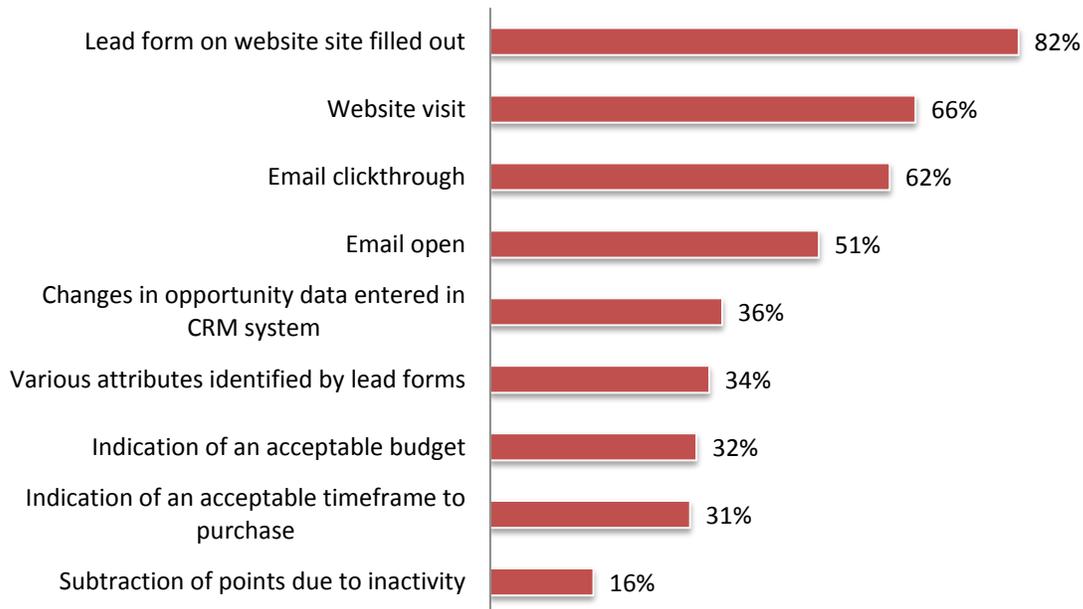
Criteria	Percentage
Lead form on website site filled out	82%
Website visit	66%
Email clickthrough	62%
Email open	51%
Changes in opportunity data entered in CRM system	36%
Various attributes identified by lead forms	34%
Indication of an acceptable budget	32%
Indication of an acceptable timeframe to purchase	31%
Subtraction of points due to inactivity	16%

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Source: ©2011 MarketingSherpa B2B Marketing Benchmark Survey
Methodology: Fielded Aug 2010, N=935

The most commonly used lead scoring criteria are behavior-based, such as "lead form filled out," "website visit" and "email clickthrough." These behaviors are excellent indicators of engagement, interest and ultimately lead quality, which is why more than half of B2B organizations use behavior-based scoring criteria in their lead scoring methodologies. A lead's demographic traits, or information the lead shares about themselves, can be an excellent indication of their buying cycle stage, such as timeframe to purchase,

or indication of an acceptable budget. CMOs should also subtract points for undesirable traits or activity, such as inadequate budget, inactivity for a certain period of time, or an unsubscribe.

When used as silos, behavioral and demographic scoring criteria come up short. When applied together as a comprehensive scoring methodology, they can help organizations identify engaged leads and their buying cycle stages to verify their eligibility to be passed on to Sales.

RELEVANCE AND TIMING: KEY COMPONENTS FOR EFFECTIVE LEAD NURTURING

By now, you understand that the goal is to meet the prospects' needs, and communicate with them on their terms. Lead scoring methodologies will determine buying cycle stage and quality status. Now that information has been gathered on these leads, it needs to be applied to segment your database, create important, relevant and interesting content that will appeal to various segments, and guide them through the buying process then convert them into customers.

The content must be relevant, and so must the timing. Organizations need to attain the timing and frequency of lead nurturing touches to provide content that prospects want or need, when they want or need it most. The following chart shows the frequencies organizations use for lead nurturing touches.

CHART: IMPROVING RELEVANCE WITH OPTIMAL LEAD NURTURING FREQUENCY
Q. Please select the time frame which best represents the frequency of touches in your lead nurturing campaign.
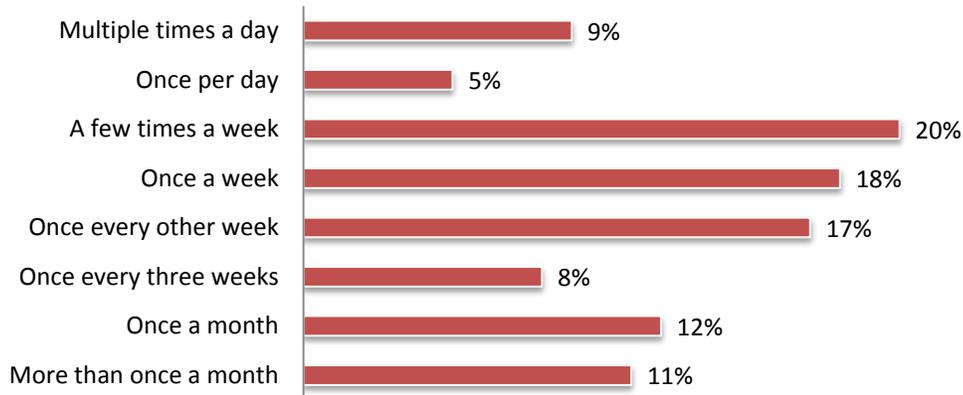
Frequency	Percentage
Multiple times a day	9%
Once per day	5%
A few times a week	20%
Once a week	18%
Once every other week	17%
Once every three weeks	8%
Once a month	12%
More than once a month	11%

Source: ©2011 MarketingSherpa B2B Marketing Benchmark Survey
Methodology: Fielded Aug 2010, N=935

The frequency of lead nurturing touches affects lead nurturing campaign performance in a number of measurable ways. Without an optimal frequency, open rates, clickthrough rates and engagement can suffer.

Effective lead nurturing campaigns include a combination of auto-responder messages sent based on actions the lead takes, and scheduled messages which have predetermined deployment times. All together, about half of B2B organizations have a frequency of a few times a week, once a week or once every other week. For organizations with higher frequencies, this is likely a result of an aggressive promotion strategy or an active audience receiving auto-responder emails for their website activity.

CASE BRIEFING: LEAD SCORING AND NURTURING CAMPAIGN IMPACTS REVENUE PERFORMANCE

Abridged Case Study ID: 31653
Location: MarketingSherpa Member Library
Summary: How the marketing team at a network management software company implemented a lead scoring and nurturing campaign to increase year-over-year revenues by 25 percent.

CHALLENGE

The pricing for a network management solutions software company's products was low enough for network managers to buy without approval. The marketing team needed to market directly to a group of prospects who were notoriously resistant to marketing and sales pitches; network engineers and IT managers.

CAMPAIGN

To connect with that audience, the team needed a strategy that put valuable, relevant content directly into prospects' hands. They wanted a buyer-directed process that let prospects reach a point where they could either buy products online or contact a salesperson for specific help in completing a purchase.

The approach included educational content, peer-to-peer interaction, online evaluation tools and automated email. The six key steps they took to develop the strategy to engage buyers were:

Step #1. Design website to mirror prospect profile. The team developed a website that spoke in a tone and style the audience typically enjoys.

Step #2. Create content for lead generation and nurturing different stages of the buying cycle. They created educational content, free tools and consideration stage content.

> *"We don't hit everyone in our database every week. That can be overkill."*
>
> *-Company CMO*

Step #3. Drive traffic to site through multiple channels to generate conversions and build the house database. The team utilized Organic search, PPC, third-party media sites and partner sites.

Step #4. Email nurturing to house database. All visitors that had registered to download content were placed in a house database for email nurturing campaigns. They segmented email sends based on prospect profile, recent activity and potential stage in the buying process.

Step #5. Track leads to identify names for sales hand-off. The team performed a lead scoring process to identify sales-ready leads that would be handed off to Sales.

Step #6. Monitor lead flow and model pipeline back to lead source. The team used Web analytics, marketing automation and a CRM system to monitor progress of leads through the funnel.

RESULTS

The company increased year-over-year revenues by 25 percent.

RECOMMENDED ACTIONS

TAKE A STRATEGIC APPROACH TO LEAD SCORING AND NURTURING

Lead scoring and nurturing campaigns can create a more efficient Sales team, and healthier sales pipelines that contribute to overall success, but not without a sound strategy in place. It is one thing to conduct light, manual lead scoring and set up a few auto-responders, but in order to effectively identify qualified leads and nurture non-qualified leads, a strategy with sophisticated processes is necessary.

The first key component of this strategy involves identifying a clear definition of a qualified, sales-ready lead and then ensuring this definition is agreed upon by Marketing and Sales. Sales buy-in will be crucial to gaining executive and company-wide adoption. Alignment issues can cause difficulties, but collaborating with Sales on lead quality can be an effective first step in bridging the gap.

Once the definition is established, lead scoring and nurturing methodologies can be determined to accurately identify qualified leads and nurture non-qualified leads to the point that they are ready to engage with Sales.

IDENTIFY LEAD QUALITY AND BUYING CYCLE STAGE WITH ADVANCED SCORING METHODOLOGIES

Effective lead scoring methodologies contain multiple criteria. Lead scoring methodologies must consider demographic characteristics, or information the lead provides about them self. It must also include behavior-based criteria, or the actions a lead takes on the company website, company emails, etc. By balancing demographic and behavioral-based scoring criteria, CMOs will be able to identify leads that are qualified and ready to engage with Sales. Don't forget the importance of subtracting points for undesirable actions or traits, such as inadequate budget or inactivity for a certain period of time.

INCREASE RELEVANCE FOR MORE CONSUMER-CENTRIC COMMUNICATIONS

Lead qualification and scoring strategies enable CMOs to make their communications more consumer-centric in order to more effectively convert prospects into buyers. When establishing lead nurturing strategies, CMOs must use the information they have collected in previous buying stages to develop content that is going to be highly relevant, useful and interesting to the various segments of their audience.

Collecting information, segmenting your database and developing great content improves relevance, but you must go even further to better meet your prospect's preferences. Optimal timing and frequency of lead nurturing messages must be achieved in order to deliver the content that your audience wants or needs when they want or need it the most. Lead nurturing touches should combine auto-responders and scheduled messages.

Launch with a reasonable frequency and benchmark your performance, then test performance of various frequencies. About half of B2B organizations have a frequency of a few times a week, once a week or once every other week.

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