

**>** **data** **>** **audit** **>** **lead > demand > profile > enhance**

**Proposal for: SaaShr**

**Brief Requirement:** Lead Generation and Lead Nurturing Campaigns

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**Date of Issue:**18 January 2012

# Introduction: Brief Requirements Summary

The key requirements for SaaShr, as we understand, are:

1. In the short term, build a segmented prospect database to help with market share growth.
2. Generate new sales-ready leads via multi-touch campaigns that include online and telemarketing to expedite traction.
3. Whereas in the long-term, develop a sustained lead nurture path that enables an end-user experience that leverages a “pull” strategy and be contacted at the appropriate time with the specific information via the preferred channel.

**The Campaign Solution**

There are 3 core solutions that go hand in hand: Building a segmented prospect database, Lead Generation & Lead Nurturing.

**Building a Segmented Prospect Database:**

Data is the most critical aspect of any lead generation effort. Hence, mardevdm2 will strive to start with the best possible prospect data to mine for leads. mardevdm2 recommends the following approach to build a prospect database:

* If possible, provide existing intelligence for the current customer base and perform a RFM analysis. This involves preliminary segmentation analyses to understand:
* Recency – when did your customer purchase
* Frequency – how many times have they renewed their license and what was the length of the contract
* Monetary Value – what is the average value of each deal
* The basis of these findings will help in segmenting the total universe of all service providers and determine your ‘sweet spot’ and a ‘DNA’ to be used to select incremental new data w.r.t key influencers and decision makers. SaaShr currently utilizes SEO, SEM and PPC for lead acquisition. These sources will also be vital to create a prospect funnel.
* Then, based on the above efforts we will create a profiled prospect database and customer universe to create a campaign pool of contacts to target. The database will be segmented based on service providers that have the same characteristics including client size, verticals served etc... Each group/cluster will receive targeted deployments and each action will add a new layer of intelligence to the database creating a virtual persona of the leads.
* The current selection criteria includes:
* Service providers with a client base of 100-400 clients

We firmly believe all of the above will create a targeted funnel with high value short-term opportunities and a ripe prospect pool to be monetized in the future.

**Lead Generation:**

Based on the funnel created, as outlined in the previous section, mardevdm2 recommends developing an end-user experience that will promptly identify short-term sales-ready opportunities.

mardevdm2’s definition of best practice lead generation is:

‘The development & delivery of effective dialogue with individuals (both prospects and customers) via integrated, relevant, personalized, timely & engaging content based upon their specific profile, behavior & identified needs. The aim is to establish lasting & valuable relationships that result in greater revenue, profitability & a superior Return on Marketing Investment.’

The proposed campaign approach below puts this definition into practice.

From a strategy perspective, mardevdm2 recommends using a “pull” strategy as opposed to a “push” strategy.

mardevdm2 proposes a 4x multi-step communication with the target audience using dynamic content and personalization, which tracks what the recipients do online, in order to automatically send the recipient the next piece of communication tailored to their interests. It will be an email based campaign with 4 distinct calls to action. The database will be updated in real time with rich behavioral data to provide more insight into the audience’s interests and decipher their level of engagement with SaaShr. The calls to action could drive the traffic to a custom hypersite based on specific product category or targeted audience. An example recommendation would be:

* Campaign 1 – Survey
  1. Purpose – Identify the true short-term resonating pain points of the target audience within the geographic segments with respect to titles, firmagraphics, etc.
  2. Identify and categorize the prospects w.r.t. the buying cycle. The five key areas of a Buying Cycle = Interest/Awareness, Education, Evaluate, Justify, Purchase.
  3. For instance, based on their behavior/engagement, a prospect could be categorized as interested but needs more information, i.e. “education” to help enhance the propensity of the prospect down the sales funnel to purchase, etc.
* Campaign 2 – Based on the results, develop a multi-themed email campaign that targets the appropriate audience with mapped content that establishes a baseline to tag the prospect w.r.t. the buying cycle.
* Campaign 3 – From the results of Campaign 2, deliver content that helps to transition a prospect into the next stage of the buying cycle, i.e. deliver a specifications document to an Engineer who might be in interested but needs to be educated or deliver a case study that addresses ROI to a Director of Finance who might be in an evaluation phase but needs to be transitioned to the justify phase.
* Campaign 4 – Similar to campaign 3, dynamically address each prospect based on their past behavior.

This approach will create a resonating campaign that will most definitely impact response rates and add structure and depth to SaaShr’s positioning in the targeted marketplace.

**Lead Generation Flow**

Marketing Qualified Lead – this is a lead that will have made some clearly defined actions but needs additional qualifiers/communications by AG Salesworks before sending it to sales.

Sales Qualified Lead - this is a lead that has made some clearly defined actions that qualify to be sent to SaaShr’s sales team.

Sales Accepted Lead – this is a qualified lead that has been accepted by SaaShr’s sales team.

**AG Salesworks** - mardevdm2 recommends sending all marketing qualified leads to AG Salesworks for additional tele-qualification. The benefit of doing this instead of sending them unqualified leads is optimization of costs through increased conversion rates, thus enhancing their ROI. In our past experience this method has yielded the following benefits:

* Enhance ROI – optimize by 30%
* Sales Accepted Ratio is increased 50-60%

**Lead Nurture:**

Based on the funnel created in the lead generation phase, mardevdm2 recommends developing an end-user experience that will nurture opportunities by continuing to drive demand and capture interest over a period of time with future prospects, by observing the detailed digital footprint of the non responder and nurture their interest via targeted emails, social engagements i.e. blog posts, SEM/SEO… mardevdm2 will work with the SaaShr team to identify the appropriate content available and develop a multi-channel approach to communicate with prospects and keep them engaged.

The campaign workflow diagram below is an example of how the campaign workflow decision rules can look behind the scenes.  This is NOT the SaaShr workflow.  This will be custom built to support the engagement campaign as required. This is merely inserted here for background knowledge.

**Lead Nurture Flow**



Based on a prospects online behavior, mardevdm2 will then feed the information into a lead scoring model which will further calibrate the lead interest in SaaShr. A lead scoring model will be developed based on mutually agreeable parameters to ensure sales efficiencies. These parameters will determine when MQL will be routed to AG Salesworks and when they will go straight to SaaShr. Our expectations on contact time by AG Salesworks will be clearly defined by both parties.

Lead flow/routing to sales will be handled by SaaShr. All leads will be passed to SaaShr via email (in an excel file) or sftp post. Sales are advised that they should follow up within 24-48 hours of receipt of the lead; otherwise the interest may go cold. If we do not receive any kind of feedback within 48 hours, we will consider the lead accepted by SaaShr.

**Tracking and Metrics**

* A **custom dashboard** will be provided that tracks vital metrics and coupled with revenues and marketing channel budgets determines overall ROI + ROI by channel w.r.t Cost Per Conversion, Cost per Acquisition, etc.
* Further, mardevdm2 will **deploy all emails** and will track every click and open.  We will, then, **add additional intelligence to the virtual personas** that determines specific articles/research/facts & figures that resonate with that cluster. This should help in positioning future messaging to those audiences.
* mardevdm2 will **track all traffic coming to the company’s website** via all the traffic drivers such SEO/SEM, etc.  This will help us understand the current prospect journey, stickiness to the website, quality of traffic per channel, etc.

**Responsibilities:**

It is understood that SaaShr will supply the following assets for the campaign:

* Supply the HTML creative’s for this campaign
* Call to action assets such as white papers, webcasts, opinion pieces etc as required
* Export appropriate data from in-house systems for analyses purposes.

mardevdm2 will therefore:

* Provide email best practice guidance – review of the HTML emails in terms of design, layout, copy, deliverability, strong calls to action, variable tailored content etc.
* 2 x emails A/B testing will be provided e.g. using different creative’s or subject line headers to test which one pulls the best responses.
* Build and host a hypersite to support the campaign & host the download materials.
* Execute the email distribution for the campaigns.
* Leverage, where appropriate, existing SaaShr content assets e.g. case studies, webinars, events, white papers, as well as complementing the 2012 marketing plan.
* Develop and manage a campaign project plan
* Develop a content calendar in collaboration with SaaShr. Content themes would include solving customer pain points around the survey results, for example, efficiencies, cost reduction, optimization, etc.
* Deliver an automated best practice campaign communications process & platform, with built in timed emails & actions to prompt response based on actual behaviors.
* Score and grade all leads in real time based upon the action taken online.
* Selectively telemarket the ‘hottest’ leads for sales pre-qualification before passing to sales
* Weekly reporting on leads. On-going campaign analysis and optimization as required.
* Only engaged leads will be passed to SaaShr Sales.

**Why this Campaign Approach?**

This proposed approach is based on best practice B2B marketing. It has been proven. Targeted data together with this type of intelligence led campaigning can result in sales increasing by up to 40% over time, marketing qualified leads increasing up to 60% and a 15% increase in visitors to your campaign website to response.[[1]](#footnote-1) This will help to improve response rates and enquiry conversions. The approach is about quality of leads for better sales conversion, not quantity.

In addition,

1. SaaShr will be provided with more engaged prospects, which are more likely to convert to opportunities, thereby optimizing the marketing budget to deliver leads that sales can actively follow up on. This in turn will improve Sales efficiency and productivity by not calling those that are just seeking information and are not in the buying cycle.
2. With the ability to track prospects throughout the campaign in real time, we are able to tweak the campaign quickly if we feel that the results are not coming through rather than waiting to the end of the campaign period to find we have not hit the results mark.
3. **Lastly, our pricing model enables us to share risk with SaaShr which, in turn, ties SaaShr’s success to ours.**

**Account Management Support**

SaaShr will be supported by an Account Management team consisting of:

* Dereck Tinarwo, Account Manager
* Bridgid Johnson, Client Solutions Manager

SaaShr will receive weekly reports on the performance of the campaign and results to date. This will be emailed to an appointee of SaaShr to review and distribute internally as required. Any leads, according to SaaShr’s definition, will be forwarded immediately to pass onto Sales teams to follow up on. At the end of every campaign, we will hold reviews to go over the results of the campaign and recommendations for the upcoming campaign. Also, at the end of the quarter, we will hold a formal Account Review.

**Costs & Timelines**

**Build a segmented prospect database + Lead Generation/Nurture Strategy**

The overall cost of the campaign for 3 month pilot can be broken down as follows:

|  |  |  |  |
| --- | --- | --- | --- |
| **Activity/Service** |  | **Cost** | **Notes** |
| **FIXED COSTS** |  |  |  |
| RFM Analysis |  | $2,500 |  |
| Campaign planning & scoping; campaign process flow development; Value proposition & copy support. Best practice support, advanced tracking. |  | $9,300 | $3,100 per month includes Eloqua license fee for database size of 25,001-50K |
|  |  |  |  |
| Lead generation - 3 email campaigns\*+ 1 survey + scoring |  | $3,500 | Set-up of email creative’s with dynamic content + 2 tests per |
| Any changes that require more than 1 hour of programming time will be billed separate @ $150 per hour with prior approval. |
| Lead Nurture Program Development & Ongoing Support |  | $8,000 | 3 email deployments of dynamic content and reminders + scoring+ engagement strategy (SEO/SEM/Social) |
| 1 Hypersite – Develop, Maintain and host \*\* |  | Incl | SaaShr will be providing content |
| Tracking & Custom Reporting |  | $3,500 | Custom dashboards + ROI analysis |
| Project Management support |  | Incl |  |
| Asset Development |  | N/A | Leverage SaaShr asset library |
| **Total Fixed Costs** |  | **$26,800** |  |
|  |  |  |  |
| **VARIABLE COSTS** |  |  |  |
|  |  |  |  |
| Data |  | Variable cost | TBD by SaaShr’s available prospect DB assets |
| CPL |  | $125 Per Lead | Lead – this is a prospect that has engaged in at least 2 activities e.g. website visit, downloads etc |

\*\*\*\* The above fixed costs reflect a 50% discount on market values for the above services. We believe in shared risk and therefore we are a performance based organization and we believe in getting paid when we deliver your desired results\*\*\*\*

mardevdm2 can assist with HTML email creation at a cost of $1,500 for the HTML template plus $350 each time we flow in new copy.  If necessary, mardevdm2 can also support with content creation. A separate quote will be provided depending on the asset-type needed to be created.

# Next Steps

If SaaShr is in agreement with this proposal, please formally accept this in writing so that mardevdm2 can proceed immediately. An email confirmation will be acceptable. mardevdm2 will then work closely with SaaShr to implement, monitor and make the campaign a success.

**Terms & Conditions**

**Non-Disclosure & Confidentiality (NDA attached)**

All information contained in this brief is proprietary and confidential to mardevdm2 and all information and rights to the information shall be held in confidence. The recipient of this document by its retention and use agrees to the foregoing restrictions and shall protect the document and the information contained herein from loss, theft, and misuse. Further, the recipient agrees not to disclose as such to any third party without the prior written consent of Mardevdm2.

**mardevdm2 SaaShr**

**Bridgid Johnson Tom Morgan**

*Client Program Manager Executive/Consultant*

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1. Eloqua Customer Case studies [↑](#footnote-ref-1)