



# **25 ESSENTIAL QUESTIONS**

you must ask your lead generation vendor

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# 25 ESSENTIAL Questions You Must Ask Your Lead Generation Vendor

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In the modern “always on” business world, “build it and they will come” does not work. Businesses have to spend considerable time finding and educating potential customers.

Many companies choose to outsource their lead generation efforts to independent vendors, who are experts in finding and establishing a relationship with potential customers who are an ideal fit for your business.

An increasing number of companies offer such services with varying degrees of success. If you’re at the point of choosing such a vendor, it’s good to know what to look for and how to make your selection.

Here are the **25 most important questions** you should ask your potential lead generation partner in order to make sure they will bring a positive impact on your business.



# Questions about the company

Start with questions that will give you a chance to get to know the candidate company better. Make sure they have the experience and relationships that will help yield more customers for your business.

A lead gen vendor should feel comfortable answering all of the following questions – they are standard for the industry and your potential vendor should have the information available at hand.

## What is your industry experience?

Your lead gen partner should know the industry in which you operate and they should have experience in it. This is important, because you want to make sure that the company you choose to work with will a) know the people you want to target and b) know how to talk to them.

## Who are your partners? Where can you place my content?

Whenever you engage in lead generation through content marketing, the breadth of publications where your content can appear is one of the most important factors for success. The vendor company you are considering should be able to present you with an extensive list of publishers with whom they can work at a moment's notice.

Develop a strong understanding of where your content is likely to appear and make sure the audience who will see it is aligned with your target segments. That way, your business is much more likely to receive new customers, thus increasing the ROI of the campaign.

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## In how many places can you spotlight my content?

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Sheer volume of places where your lead gen vendor can distribute your content is not enough. The volume of marketing collateral published by companies is enormous, so having your content featured in the right places can make all the difference when it comes to being noticed.

Experienced lead gen companies have dynamic relationships with their partner publishers, which allow them to get their customers' content in front of the right eyes. As part of the deal, your partner should be able to guarantee that your content will be given premium placement on a number of sites – the more, the better for you.

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## Who are your current clients?

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Your prospective partner should be able to demonstrate some of the work they've done. To follow up on one of the previous questions, if they have experience in your field, they should be able to demonstrate it by mentioning companies in the same industry with whom they have worked.

You can follow up by asking for permission to speak with some of these customers – if the vendor is confident in the service they provide, they should be happy to provide referrals.



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## Do you turn down clients? Why?

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No one likes to miss opportunities to bring more revenue to their business, but every good lead gen vendor knows that their success depends on the success of their customers. So, your partner should be brave enough to say no if they feel their field of expertise falls outside the needs of a potential customer.

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## What are your success stories? And your failures?

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It should be really easy for a lead gen company to provide examples of clients that saw great benefit from working with them. Ask for case studies to learn more about the best ways to structure such campaigns (in the best case scenario your potential partner will be able to provide one from your industry).

But also don't forget to ask about cases where the vendor wasn't so successful in helping the client. Do not expect to see a full-fledged case study, but the vendor you're talking to should be able to talk about such occasions and tell you what they managed to learn from them.

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## What KPIs do you use to measure the success of your campaigns?

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It is important for both sides of the partnership to be using the same performance indicators to measure the success of the campaigns they run together. There are a number of metrics that are used throughout the industry: downloads (of content), opportunities generated, and appointments set, to name a few. When negotiating with a lead gen vendor, make sure to agree on a set of metrics that align with your business goals. If you are tracking different metrics it might be the case that each side is after a different objective.

You can also use KPIs as a tool to measure the performance of each potential partner in previous campaigns. This may be useful when comparing the different lead gen partners you are considering.



## Where do your leads come from?

Knowing how your potential partner collects data should be your priority for a number of reasons. First, this can help you get an idea of how specialized they are in your industry/focus area. Second, it also helps you figure out how legitimate and experienced your partner is. In content marketing, seeing a list of the publications/companies the vendor works with and the databases that your vendor uses speaks volumes about the level of their commitment and experience in the industry.

## Do you re-sell leads?

Generally, unique leads are of much higher quality and cost than shared leads. Leads can be sold to a number of competing companies in some cases. The best way to protect yourself against this practice is by discussing who's going to own the final database (discussed in another question further down in this document).

The second method of re-selling leads is if a company monetizes its database by sharing it with other lead gen vendors. Avoid partners who practice this at all costs, as it is highly likely that the leads they provide to you will have much lower conversion rates.

The reason for this is that as leads get contacted by numerous lead gen vendors, they start to perceive such interactions as much more invasive (i.e. spammy), leading to a massive drop in engagement.



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## What kind of filtering/targeting criteria do you provide for leads?

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One of the most important things for you as a client is that your lead gen partner enables you to reach the right audience for your business. Find out in the greatest detail possible what kind of filtering your selected vendor offers, as this will have a huge impact on the success of your campaigns and your ROI.

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## What information do you collect on leads? Do you pre-populate forms?

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Make sure you're not asking leads to submit the same information over and over again. Publishers and lead gen vendors should collect the bulk of all relevant information about readers upon sign up, and they should also fill out their details request forms with this data. If you ask leads to fill their details more than once, you are very likely to see a high drop in conversion rate, or a high percentage of fake information.

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## Do you outsource/offshore?

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There is nothing wrong with outsourcing and offshoring part of the work on the campaign. However, it is beneficial as a customer to know exactly how the campaign is performed. If you trust your brand name to your partner, it makes sense to know at all times who is going to be representing it and what measures your partner takes to preserve its value.



# Questions about the partnership

Once you're done with getting to know the company, move to more detailed questions about structuring your partnership with the lead generation vendor.

## What will the onboarding process look like?

Your lead generation partner will essentially be representing your brand in the earliest phases of interacting with your future customers. That's why it is so important that the vendor you choose has a clear understanding of your brand, your offering(s), where they are going to fit, and how they are going to complement your business processes.

Make sure to also discuss and agree on how you are going to structure the initial training so that your partner will learn the most about your business and your brand.

## What are the qualification criteria going to look like?

No matter what method of payment you agree to (covered in one of the following questions), the number of leads produced during the partnership is surely going to be one of the most important measures of your vendor's performance. That is why it is important to always discuss and agree on a definition of what makes a lead a billable opportunity.

Make sure your partner gives you enough room to influence the process and have your say on the definition, otherwise you might end up being unhappy with the final results, even if they formally fulfill the criteria.





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## What kind of reporting/statistics do you provide?

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Beyond knowing which KPIs your partner uses to measure success, you will also want to be able to measure the performance of your content along different segments/groups yourself. Having access to this kind of data can also guide your content production data, thus greatly increasing the efficiency of your campaigns.

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## How do you charge?

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There are several typical ways to structure a lead gen campaign when it comes to compensation – the most popular two are monthly fee, and/or pay per performance (by number of warm leads/appointments/opportunities generated). Neither is inherently better than the other; which one you employ depends to a large extent on past history, personal preference, and campaign specifics.

No matter which type of payment you choose to use, there are several details you should consider. For example, if you choose to use pay per performance, be very careful with the definition you agree on for what makes a billable lead (see question on qualification criteria above). With periodic fees it's essential to develop a Service Level Agreement – a set of commitments made by both sides on the minimum work to be done during the billing period.

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## Are there any additional/setup fees involved in the campaign?

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Some lead gen vendors charge additional fees as part of the total campaign compensation. As the client, it is essential to know this during your research process so that you can take this information into account when comparing providers making the final decision.

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## Do I need to sign a long-term contract?

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No one likes to be tied into a lengthy contract and for good reason. Beware of vendors who want to lock in a long-term commitment without any flexibility even before the partnership takes off. Serious lead gen partners should be happy to get the chance to prove the value of their efforts by leaving the arrangement open-ended.

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## Will your systems integrate with my software?

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Make sure your vendor's solution can be linked to your systems for quick and easy transfer of leads to your sales department. The lead delivery format from your lead gen company should be able to link with your CRM solution. Without this kind of integration you are likely to spend countless hours manually adding leads from spreadsheets into your platform.

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## Who will own the final database?

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It is important to get a commitment that you will be the final owner of the information you receive during the partnership. This helps you guarantee that the leads collected during the campaign won't be resold later to another client after your partnership has run out.

Similarly it gives you peace of mind that the leads you're getting are not being reused from a previous campaign, thus lowering their general quality.



## What exactly happens when a lead is transferred?

When discussing with your potential lead gen vendor, make sure to agree how leads will be transferred. In addition to the integration between their systems and your software, you should also discuss what additional information will be passed along with the lead and in what format.

## When can I expect the first lead to come in?

So, you've finally made a decision on a lead generation partner, agreed on all details, and your sales team is ready to take in those opportunities and turn them into loyal customers! Unfortunately, they have no one to talk to yet...

You can avoid this kind of situation by clarifying with the vendor how long it is going to take for the campaign to start producing actionable leads. Typically, that "ramp-up" period will be 1-2 weeks, but make sure to check with your partner.

## Who will be responsible for updating content?

Industries emerge and wane, businesses change, new research is released. All of that means your marketing collateral should be constantly monitored and updated to ensure it remains relevant and attractive to your target audience.

Consider outsourcing this process (at least partly) to your lead gen partner or an Industry expert. As your content inventory grows, the task of keeping it up to date is likely to become increasingly time-consuming.



## How are we going to grade the success of the campaign and adjust it if it is underperforming?

Things always look promising before you start working with a lead gen partner, and oftentimes campaigns work well and produce the results that you want without any extra effort on your part.

Unfortunately, that's often not the case. Be prepared for the worst-case scenarios by agreeing on a grading method and a timeframe with your partner. That way you can be prepared to make adjustments if you aren't happy with the results.

## Why shouldn't we develop lead gen internally?

This question is a curveball. Of course insourcing is a possibility. This question gives your potential partner the opportunity to explain how they are going to add value to your business. Look out for business partners who get defensive – it might signal they are not so confident in their ability to create real value for your company.



# Conclusion

Lead generation represents a great shortcut to hack your content marketing growth. If you are producing high quality content, this tactic has the potential to greatly improve the velocity by which people discover it. Choosing a partner for this task may seem daunting at first, but if you follow the right selection process and ask the right questions you can make a choice with a high level of confidence.

## Lead Gen Vendors Cheat Sheet

Partner name:

Question	Notes	Happy with answer?
1. What's your industry experience?		
2. Who are your partners? Where can you place my content?		
3. How many places can you spotlight my content in?		
4. Who are your current clients?		
5. Do you turn down clients? Why?		
6. What are your success stories? And your failures?		
7. What KPI's do you use to measure the success of your campaigns?		
8. Where are your leads coming from?		
9. Do you re-sell leads?		
10. What kind of filtering/targeting criteria do you provide for leads?		
11. What information do you collect on leads? Do you prepopulate forms?		
12. Do you outsource/offshore?		
13. What is the onboarding process going to look like?		
14. What are the qualification criteria going to look like?		
15. What kind of reporting/statistics do you provide?		
16. How do you charge?		
17. Are there any additional/setup fees involved in the campaign?		
18. Do I need to sign a long-term contract?		
19. Will your systems integrate with my software?		
20. Who will own the final database?		
21. What exactly happens when a lead is transferred?		
22. When can I expect the first lead to come in?		
23. Who's going to be responsible for updating content?		
24. How are we going to grade the success of the campaign and change it if it's underperforming?		
25. Why shouldn't we develop lead gen internally?		





## Alexander Kesler Bio:

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Alexander Kesler is a visionary B2B digital marketer and has been practicing in the fields of technology, software, education and digital security, among others, for over 15 years.

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