





# Managing the outputs of multi-channel marketing - digital & traditional

How to process, control and qualify multi-channel contacts, wherever they come from

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**Today, most large B2B corporations engage in multi-channel marketing, with a wide variety of digital channels augmenting and even supplanting traditional routes like advertising, PR, trade shows, telemarketing, customer events, and so on. Just because the channels down which customers and prospects are making contact have diversified, increased and changed in character does not mean that the fundamentals of qualification are different – marketeers must still deliver properly qualified leads to sales if they want to do their job properly.**

This White Paper proposes how to use data processing and modelling techniques to process and control a steady flow of well-qualified leads in a world where digital channel s are ever-expanding but traditional techniques will continue to exist and be important.

## DIGITAL 'LEADS'

**All too often the providers of digital channels claim to generate 'qualified' leads. But just because a 'lead' comes from a digital source does not make it qualified! Few marketing managers would ever have sent a list of all attendees at a trade show stand straight to sales without filtering and qualifying them first – why should a brochure download be treated any differently?**

We are all aware that the great advantage of the new channels is that, instead of receiving a single 'touch' from a prospect (say, a response to a mailing), it is likely that he or she will effectively be making contact in several ways (say, a couple of click-throughs, a brochure download, a question in a blog and attendance at an exhibition).

If you take any one of these 'touches' in isolation, they will almost certainly not be properly qualified at all. Worse, they will have the effect of 'infecting' the real leads – once a salesperson sees a few bad leads, he or she tends to ignore all the others from the same source.




Furthermore, many digital 'leads' are essentially of the 'pull' variety – that is, from accounts who have been carrying out web research and are showing interest in what your company has to offer. Some may already be in your database, along with information about what potential they have, but many others you will know nothing about. So you should take into account further points:

- What is the potential of this prospect? If high, you might well want sales involved at a much earlier, less qualified, stage.
- If you do not know the prospect, how should you qualify it and measure its potential? And how much time should you spend doing so?

## CONCEPT

**Our thesis is that you should implement a process design which brings together all the data, including potential measurement and both digital and traditional 'touches' uses all the information to deliver high quality and timely leads to sales.**

We suggest three underlying principles:

**Used properly, the explosion in digital channels and the continued existence of traditional methods can radically improve the qualification process.** If you have an active lead generation-based marketing program, only a comparatively small proportion of the individual contacts which you receive will be sufficiently qualified to go straight to sales as a lead – but if you can combine several 'touches' together the resulting lead will probably be better than that one-off traditional enquiry.

**Not all touches are equal.** Clearly, an inbound telephone call enquiring about a product or service is probably a more powerful indicator of interest than a click-through on a web site – although it still not might be qualified properly. Furthermore, some prospects are more potentially valuable than others. In fact, that in-bound call from one prospect might well be less valuable than a mere click-through from another, higher potential prospect.

**Not all prospects are equal.** An incoming prospect which is already on your 'hit list' is probably much more valuable than one you know nothing about, and should be treated as such.

The implication is that, to make the process work properly, you need to gather together all the inbound touches, digital and traditional, which your company receives and either relate each to the customer or pre-recorded prospect to which it belongs or correctly create a new 'green-field' prospect.



## TYPES OF 'TOUCH'

**Seen from a data processing perspective, 'touches' generated by marketing can be broken down into three types:**

1. **Touches which derive directly from targeted marketing activity.** This is when the touch can be directly and easily related back to a marketing activity directed at the specific person and/or company who has responded. Examples are e-mail responses, tracked click- throughs and pre-coded coupon responses. These are easy to process – you can directly identify from whom the response has come via its actual or hidden code and record it against the record in your database from which it originates.

2. **Touches from customers or prospects you already have on record.** This is where your company has received, for example, a telephone call, and although there is no code on the response, which in data terms directly identifies your record of the responding organisation, you can find the respondent (or at least his or her organisation) in your database of customers or prospects. This requires some kind of matching process.

3. **Touches from unknown prospects.** Finally, you will have organisations contacting you of whom you have no apparent knowledge or record. These are in effect all the records which fail the matching processes used for types 1 and 2. Problems arise when the matching is not done



correctly, because at best you will be creating new and duplicated prospect records and at worst missing a crucial connection with an important customer or prospect.

It is types 2 and 3 which are the data processing problem. For them, you will need a process which, as automatically as possible, will identify where the incoming touch already matches an organisation in your database and links it to the corresponding record; it should also either match to an existing contact name or, where a contact name match genuinely cannot be found, create and qualify a new one. Similarly, if no match is possible to an existing organisation customer or prospect, it should create a new 'green-field' record.

## VALUING THE TOUCHES

In our view, the best approach is to develop a 'scoring' system which values both your underlying customer and prospect records and your inbound touches, such that you can easily and automatically route only qualified opportunities to sales.

As an example, look at the tables below:

### CUSTOMER & PROSPECT SCORES

| Category | Profile status or Activity type | Value of Status |
|---|---|---|
| Customer status | Customer - >$100,000 per year<br>Customer - <$100k per year<br>Non-customer | 100<br>50<br>0 |
| Number of employees | >1,000<br>100-999<br><100<br>Unknown | 40<br>20<br>5<br>0 |
| Business activity | Manufacturing<br>Distribution<br>Other or Unknown | 20<br>5<br>0 |
| Source of prospect data | Targeted prospect<br>Other/unknown | 20<br>0 |

## TOUCH OR ACTIVITY SCORES

| Category | Profile status or Activity type | Value of Activity |
|---|---|---|
| Inbound Channel | Telephone<br>E-mail message<br>Click-through<br>Other or not applicable | 50<br>30<br>10<br>0 |
| Telemarketing | Lead<br>Positive qualification<br>Negative qualification<br>No contact after five attempts | 100<br>30<br>-20<br>-5 |
| Sponsored Events | Contact registers for event but does not attend<br>Contact attends event | 10<br>20 |
| E-mail campaigns | Respondent opens e-mail message, but does not click through<br>Respondent opens message and clicks through on e-mail message once<br>Respondent opens message and clicks through on e-mail message multiple times | 5<br>10<br>30 |
| Webinars | User accesses webinar and stays more than 5 minutes<br>User accesses webinar and stays more than 20 minutes | 10<br>30 |
| Exhibitions (trade shows) | Contact attends | 10 |

Let us assume that a total score of 100 automatically triggers the notification of a qualified lead to sales.

Such a trigger could arise from many situations, for example:

- ***A non-customer registering*** *for, but not attending an event (score 10) if the company is known to have more than 1,000 employees (score 40), was entered to the database as a Targeted prospect (20) and was at some stage positively qualified during a telemarketing campaign (30).*
- ***A smaller customer*** *(<$100k/year – score 50) who shows interest over a period by clicking through three times on different campaigns (30), attending, but not staying at, a webinar (10) and appearing on a list of attendees at a relevant exhibition (10).*
- ***A non-customer telephoning your customer information centre*** *(score 50) to obtain information who was positively qualified during telemarketing (30) and then attends a webinar for at least 20 minutes (30).*




So the aim is not necessarily just to send, say, telemarketing Leads, to sales, but to identify potential sales opportunities resulting from both ongoing activities and the relative attractiveness of the target organisation as an actual or potential customer.

## CHECKLIST FOR IMPLEMENTING A MULTI-TOUCH MANAGEMENT PROCESS

To make the whole process work, we suggest you should design in the following elements:

1. **A suitable marketing database** capable of accommodating the necessary customer and prospect details and profiles.

2. **An automated process** to match incoming touches to your database and add new records (new contacts on existing records as well as complete new organisation records). In practice, such a process will also require manual intervention and monitoring to resolve possible matches and in some cases carry out web research.

3. **The capability to profile new organisation records** to add parameters such as organisation size and business activity. This can be supplied by matching to an external database or by web research.

4. **An automated scoring process** running against the database, designed to extract new leads and notify them to sales. Management reporting of progress is also essential.

5. **A feedback loop from sales** to assess the quality of the qualified leads and refine your scoring process.

## ABOUT CELSIUS

**Celsius helps our B2B multi-national customers to gain the best return on their marketing investment by increasing their prospect and customer value. Our direct marketing and database solutions enable them to understand better their target markets, improve sales performance and broaden market coverage throughout Europe and, in many cases, beyond.**

We cleanse, enhance, develop and manage customer and prospect databases for our customers and then help them to put them to work – using telemarketing and e- and postal-mailing. Our customers include SAP, Microsoft, Symantec, Continental AG, Cisco, Autodesk and outside the B2B sphere, BMW.

Our main office is in France's 'Silicon Valley' at Sophia Antipolis, not far from Nice, where our staff includes ten different nationalities and speaks thirteen languages.

**To learn more, go to www.celsiusinternational.com or call Coraline Sidney on +33 4 92 94 40 00.**