Automation Revolution:

Five Steps for Demand Generation Success

Convertr™

A revolution is taking place right in front of us.

High speed and quality leads have shifted from being a luxury for sales teams into an expected requirement. The days of spending weeks waiting to follow up with a lead are over. A tougher economic climate means brands and their agencies need to seize the moment, deliver leads quickly and enable teams to engage with prospects promptly.

Despite the demand from sales, marketing and operations teams responsible for delivering leads and fuelling the sales pipeline are struggling to keep up. Weighed down by time-intensive, manual processes, lead management is in desperate need of digital transformation.

The reality is that even the largest enterprises still use spreadsheets as the dominant tool for managing leads. However, one of our largest customers shared that when using Convertr, they were able to save 100 people hours on list upload tasks per quarter. While spreadsheets like Excel and Google Sheets certainly have a place in many business areas, it is increasingly not in lead management.

A lack of lead attribution, difficulty with reporting as well as the compliance and governance risks are just some of the obstacles creating havoc for teams working in this way. Sales teams realise this too, with many now refusing to accept leads shared in CSV or Excel formats as these create bottlenecks where manual processes are needed to upload data to CRM platforms. Instead, enterprises need – and want – seamless lead capture and management systems.

And they can have them too. Digital transformation and the power of automation provide the solution. When automated systems are set up and installed correctly, marketers and lead generation teams can deliver leads at the speed and quality expected, and ensure that their campaigns are generating long-term ROI. However, knowing where to start on the journey of digitally transforming lead management processes and knowing the pitfalls to avoid is crucial.

Emma Bowkett
CEO & Founder

In this report, we provide our steps towards achieving digital transformation in your lead management operations. Developed from our years of experience and technical expertise in setting up, managing, and supporting digital transformation programmes for enterprises, agencies, and publishers; our five steps to success will help you unlock the full potential of your lead management process and ensure sales pipelines are kept full of quality leads.

Sales and lead generation is going through a revolution

Brands and agencies can no longer wait days, weeks or months for leads to arrive if they are to remain competitive. At the same time, lead quality has gone from a promotable feature to table stakes, for enterprises that are looking to maximise the ROI of lead generation campaigns.

Yet, the reality is that sales and marketing teams are struggling to keep up.

According to Gartner, only 44% of MQLs pass through sales as a potentially good fit, while the average B2B business takes up to 42 hours to respond to a lead.

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>
> **Gartner**

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>
> **Harvard Business Review**

As time ticks by, what could once have been a great lead can quickly become obsolete as prospects move on to other suppliers. At the heart of the problem are slow and inefficient manual lead generation processes. The simple truth is that these take too long to result in an opportunity, create mistakes and allow false data to seep in.

Convertr also significantly speeds up the time it takes to validate a lead. One customer in particular found that between September - December 2022, there were a total of 35,483 leads processed, and the platform was able to save them almost 250,000 minutes of time manually processing leads.

If businesses are to boost profits, propel the speed of lead flow, free-up precious resources and build foundations for long-term success, then they must change the systems and processes they use for lead management.

Demand generation is broken

Teams responsible for driving leads that are relying on time-intensive manual processes, compounded by a waterfall approach to lead management and verification, are inhibiting their own growth and holding themselves back from reaching their full potential.

Messy. Complicated. Dysfunctional. These are just some of the words we hear time and time again from organisations describing their frustrations with the lead generation process. Consisting of an enormity of individual steps - from designing the brief, capturing data, checks for duplications to auditing and qualifying leads, before standardising and formatting data and delivery to a client or sales teams - the typical lead process includes up to half a dozen siloed teams making do with outdated approaches and technology. As a result, the validation of lead quality and the speed of delivery slows down to an almost glacial pace.
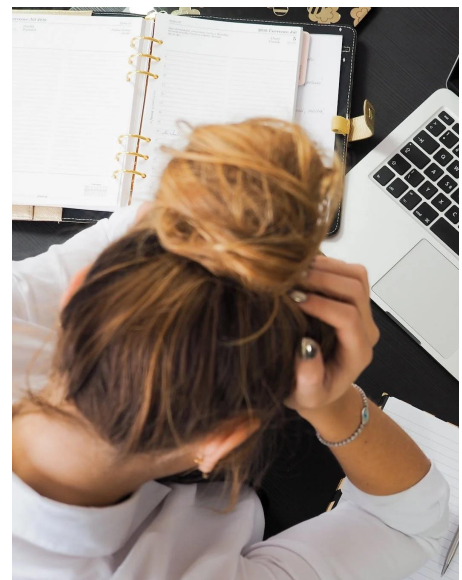
Furthermore, a waterfall approach to lead generation means that one process cannot start until the other is completed. While this has advantages in its simplicity, it holds businesses back from processing leads at speed. Equally, manual processes are not only slow, but they also increase the risk of issues arising with compliance and data protection.

While many brands and agencies have built successful business processes around legacy systems - often self-built and designed - they now hold them back. It's all too easy to get caught up with a system that does the minimum required but cannot scale and move at the rate that is really needed.

Brands that hold off updating their systems will not be able to get the level of control needed to pursue their own leads. On the other hand, brands and agencies that fail to adapt will be left behind, and run the risk of being unable to deliver valid leads to their Sales teams.
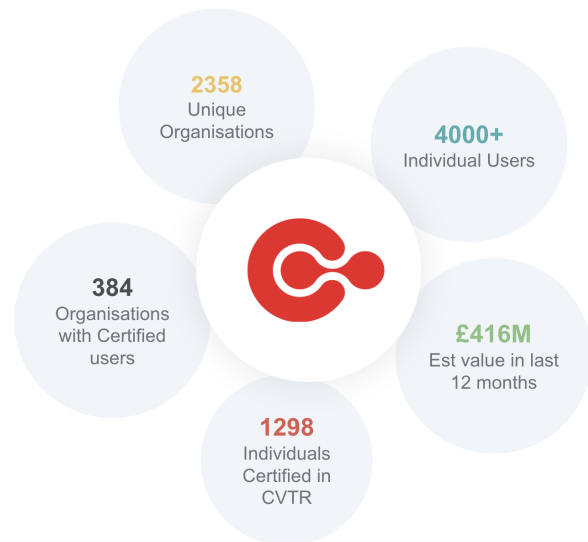
But there is a solution.
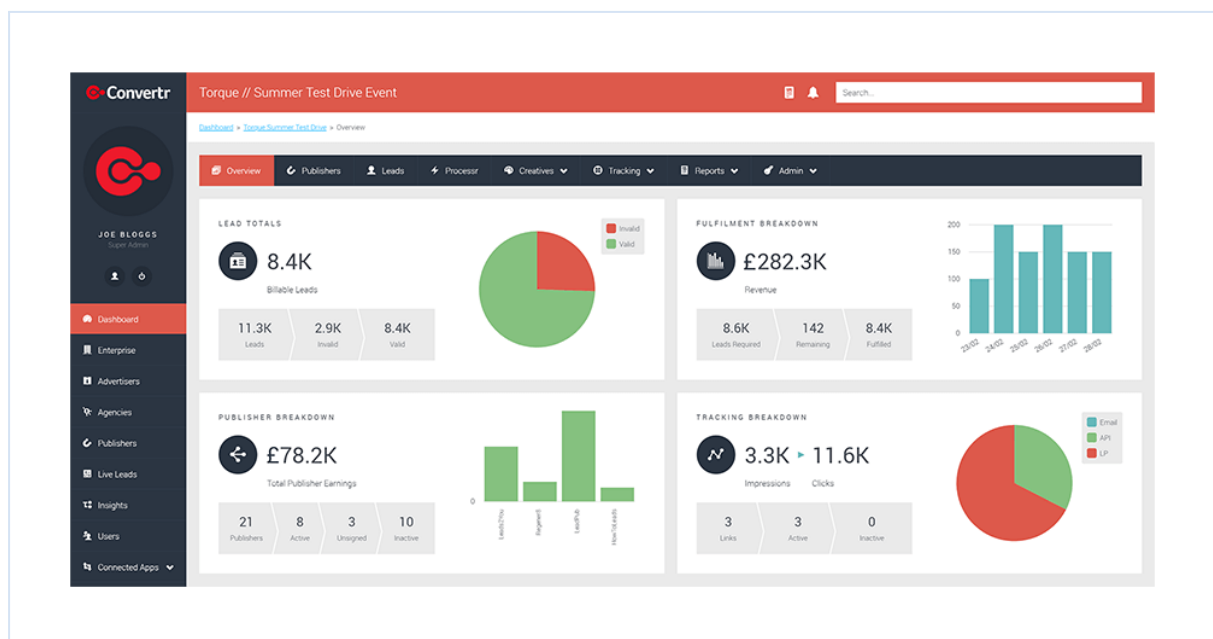
Digital transformation and the use of automated systems like Convertr provide a path for success that enables you to operate at speed and deliver high quality leads.

Importance of Automation

At Convertr we are driving the digital transformation of lead management. Working with pioneering and innovative industry leaders at the cutting edge of lead generation, we have successfully completed digital transformation programmes that have unlocked hidden potential.

2358
Unique Organisations

4000+
Individual Users

384
Organisations with Certified users

£416M
Est value in last 12 months

1298
Individuals Certified in CVTR

Our ecosystem is made up of leads processed from over 2,000 organisations, the majority of whom have multiple users. We have a unique window into the impact that a digital transformation programme, backed by automation can have on businesses across the supply chain.

Streamlining operations and optimising partner performance

We work with a number of leading tier one, technology brands, helping them to digitally transform their current processes and workflows. Often, when reviewing a brand's lead management process, we uncover significant amounts of budget wasted on demand generation campaigns that fail to deliver valid, high-quality leads at the volume and speed its sales team required.

Working closely with internal teams, Convertr starts by identifying several areas in which automation could streamline operations and optimise the performance of lead suppliers and partners. For instance, following the installation and setup of Convertr's lead management platform, one technology leader used its reporting functionality to gain detailed insight into who is engaging with their content, and accurate data that was used to inform future decision-making processes. In doing so, the brand was able to optimise the way it worked with suppliers and partners to ensure the highest quality of leads were delivered.

Similarly, they were also able to optimise their lead management flow through automation - which meant that they could prevent bad data from entering their CRM. Automation also helped to improve security and compliance, by removing the need for human intervention and ensuring that data was handled, stored and distributed securely.

One brand in particular was able to digitally transform its lead management process and adopt increased levels of automation. As a result, they now process 85% of its leads without any manual intervention and enjoy an increased streamlined operation and improved partner performance.

A global technology leader now **processes 85%** of its leads **without any manual intervention**.

Simplifying and accelerating

We're also seeing clients on the supply side implementing their own digital transformation programmes. A world leading B2B data company used Convertr to implement its own digital transformation programme. Having previously built itself around manual workflows and processes, the company had reached an inflection point. It was becoming challenging to scale the business in accordance to its growth trajectory - all whilst remaining profitable. This meant that they had to rethink its lead management system.

Convertr enabled the business to **automate and manage** 30 individual processes.

With Convertr, the business was able to integrate its existing CRM platform and project management system. Working seamlessly with the existing tech stack, Convertr enabled the business to automate and manage 30 individual processes including campaign set-up, channel allocation, campaign execution and data validation.

Making this possible is Convertr's rules engine which has allowed the enterprise to transition away from a waterfall model of operation, which created bottlenecks that limited the speed of lead flow, to one where processes can happen concurrently.

By simplifying and accelerating the delivery of leads, while enabling the business to maintain the high level of customer experience (CX) it is renowned for, the digital transformation programme has opened new possibilities for growth.

Steps for Demand Generation Success

Where should you start when it comes to setting-up for demand generation success? Relying on spreadsheets and manually processing leads may work at the very beginning, but as businesses scale, these processes quickly become unsustainable.

By automating tasks and following five key steps for demand generation success, it's possible to unlock the full potential of your lead generation process:

☑ Test rules and validate quality

In today's economic climate, it's imperative that brand teams are prioritising and obtaining the highest quality, most relevant leads, first. This requires setting up the campaign, logic, and understanding of the rules for your demand generation process. Rules may include criteria such as target companies, job titles, seniority or company size.

This is vital to ensuring a successful transition to fewer, more capable, and effective, workflows. Ahead of any full deployment, small-scale tests of existing and desired workflows must be conducted to eliminate any disruption to day-to-day operations and check that the results expected are delivered.

Secondly, focus on quality assurance by cross-checking leads against platforms such as LinkedIn to ensure their legitimacy. Embedding manual quality assurance processes into the new workflow at this stage will help ensure the continuous validation of high-quality leads.

↰ Work-out your workflows

Ahead of any new system or platform being installed, it's important to identify what existing processes can be automated, what technology supports these procedures and how they interact.

From pre-launch to campaign execution, reporting and monitoring to the close-out of a lead, these processes can typically consist of up to six, seven or eight workflows. Underpinned with multiple layers of technology from Salesforce and HubSpot, to Monday.com, and simple Excel sheets, run independently by up to half a dozen teams, these complex and messy workflows need to be consolidated into fewer streams.

While CRMs and marketing automation platforms are crucial to understanding your workflow, it is important that you consider how all the various data routes are filtered before they enter the operation. Once you have identified these workflows, disparate technologies and systems, you then map how they are interconnected across the organisation – if they are at all. Only once you have a full picture of the current state-of-play can you move on to figuring out how these can be bought together and automated for greater efficiency and higher quality of leads.

🔴 Create mindsets ready for change

McKinsey estimates that [70% of change programs fail](#) to achieve their goals, in large part due to employee resistance. Often, this is not from malicious intent, but because people lack the skills or confidence to effectively use new technologies.

To succeed, leadership teams need to ensure digital and automation initiatives bring people on the journey with them, starting with an established goal and clear vision that's clearly communicated throughout the organisation, along with educational programmes and support for all employees. Not only must leaders use the new systems themselves, but they should also require reports and updates are delivered through the system to ensure its use is embedded into processes. Developing the skills and competencies of people within your team to allow technologies to be used effectively is equally key. Initiatives such as the Convertr Academy programme have a valuable role to play. Focused on best practices, Convertr's certification programs provide users with the competency, knowledge, and expertise needed to capture, process, and deliver customer data using the Convertr platform.

⊡ Realise initial benefits

Now, you are ready to start realising tangible benefits from automation and greater compliance. At this point, it's important for brands to put measures in place to track business outcomes related to growth.

Establishing Key Performance Indicators (KPIs) will also help justify investment and enable continued monitoring over time so any programmes can be adjusted based on success and performance. Some examples to think about include the number of campaigns running through the new system within the first three months after setup, the number of staff certified to use the new system, mapping, validation rates and of course, how many leads are delivered.

⚡ Sustain long-term success

The importance of sustaining change seems self-evident, but continuous dialogues and communication between all stakeholders as the benefits of implementing new processes and technologies come to fruition is vital for long-term success. Internal steering committees, educational efforts and feedback are all needed to ensure the program's long-term success, evolution, and continuing value. Equally, it is beneficial to utilise lead management platforms or marketing automation tools that update automatically - this will give you confidence in the scalability of your business.

Create Change with Convertr

If you would like to know more about how Convertr can help your organisation enhance, automate, and improve its lead generation process, get in touch with us today.

About Convertr

Convertr supports the business transformation of sales and lead generation teams. Working with the world's leading organisations, its leading data routing and optimisation platform, helps its ecosystem of brands, agencies and suppliers extract real value from their lead data, convert it into powerful prospects and achieve better results from marketing campaigns.

ISO 270001 certified and compliant with data privacy regulations such as GDPR, Convertr's lead data management platform works synergistically across the B2B MarTech stack. By automating and simplifying mundane, yet time-intensive processes like lead validation, enrichment, formatting, cleansing, and routing, Convertr enables enterprises, publishers, and agencies to deliver high-quality leads at speed.

Fully agnostic, Convertr's platform connects any demand channels including lead files, paid media, and content syndication, with CRM or analytics platforms like Salesforce, Marketo, Hubspot, and Microsoft Dynamics to provide a centralised platform from which lead generation programmes can be tracked and managed.