

Rubicon™

marketing group, inc.



Marketing Leads Dashboards Webinar

April 25th, 2007

Topics To Be Covered Today

- Marketing leads dashboards
 - What are they ?
 - Why do I need one?
- What Sales and Marketing processes are required?
- How do I keep the data valid?
- What technologies can help me?
- What are the benefits of successful leads dashboards?



Introduction: Kevin Joyce



Senior marketing executive with 24 years of experience in the high-tech industry, engineering, marketing and sales. Ideally suited to help firms who have complex products and markets, looking for rapid growth

- CEO of Rubicon Marketing Group
- Vice President of Marketing at Unicru
- Director of Sales at IBM
- Director of Product Marketing at Sequent
- Computer Engineer at Floating Point Systems
- MBA in Marketing, University of Portland



Introduction: Robert J. Moreau



Developed and executed lead generation, marketing and direct response campaigns for some of the country's largest brands.

- EVP Sales & Marketing, Rubicon Marketing Group
- EVP Sales and Marketing, Inside Prospects USA
- Founder of RJM Direct: Full service Direct Marketing Agency
- Presented at over 30 conferences and seminars
- President of the American Marketing Association, Oregon Chapter

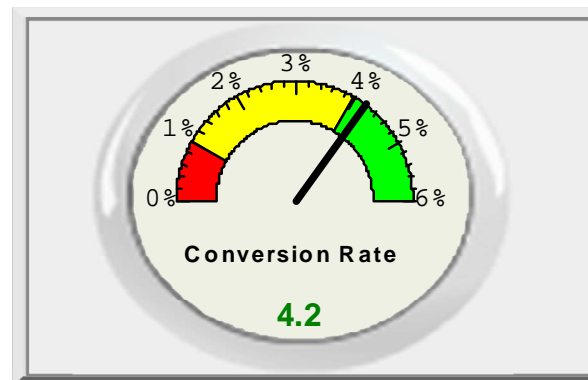


Marketing Dashboards



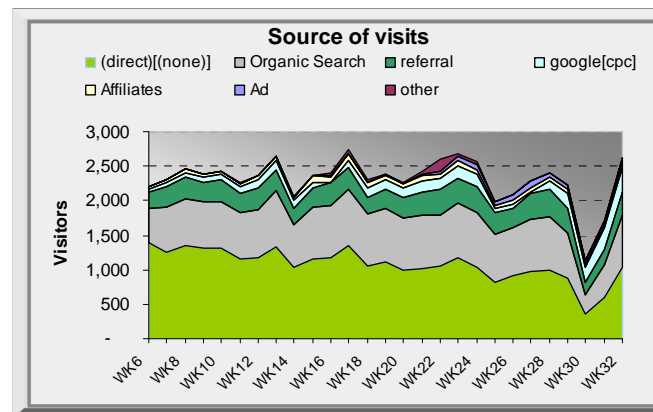
What Is A Marketing Leads Dashboard?

- Provides focus on the key lead metrics of a system
 1. Program efficiency/effectiveness
 2. Lead quality
 3. Funnel reports:
 - Quantitative historical and predictive analytics
 - Product related demand generation



Other Lead Dashboard Attributes

- Provides alerts when thresholds are exceeded
- Provides validation that key drivers are in a nominal state
- Tailored to the individual's or functional level's needs



Why do I need a leads dashboard?

- So you can give sales more of what they want
 - qualified business opportunities
- To empower marketing team to do their job better
- To maximize your marketing ROI
- To demonstrate the value of lead generation
- Find “problems” faster and make necessary changes to address lead flow challenges



Different Audiences, Different Dashboards

- CEO, COO, CFO, CMO, CIO
- VP/Dir of Marketing/Sales
- Sales operations manager
- Marketing program managers



Dashboard focus #1

Relative efficiency/effectiveness of programs

- Number of leads per program
- Lead conversion rate per program
- Lead to close per program
- Comparison of programs – efficiency and effectiveness
- Program/offer effectiveness by product
- Cost per lead per program, media cost comparisons
- Marketing cost per order dollar
- Marketing cost per marketing employee
- Marketing cost per new lifetime customer value



Dashboard focus #2

Qualitative lead analysis

- Lead source, lead status, marketing lead source
- Conversion rate trends
- Lead duration in each phase
- Customer activity metrics – tracks to best opportunities
- Lead source by product interest
- Abandonment rate



Dashboard focus #3

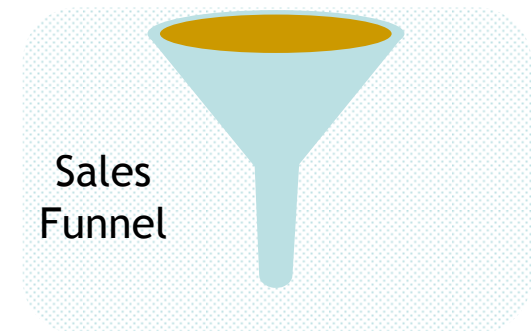
Funnel reports:

- Quantitative historical and predictive analytics
- Product related demand generation by region
- Sales follow up
- Leads by region
- Leads by product
- Sales pipeline coverage
- The lead need for the next quarter

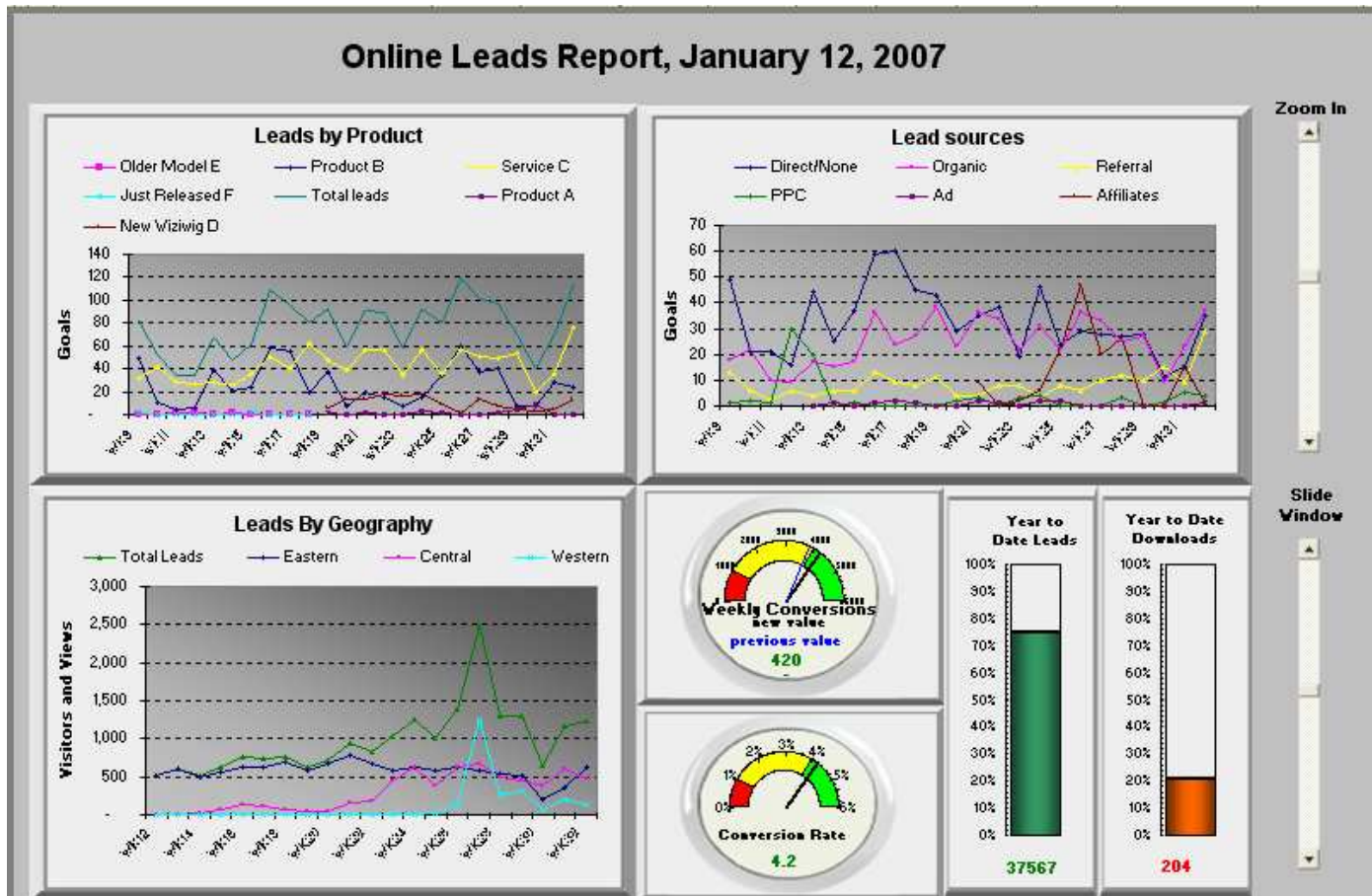


Frequency of Reports

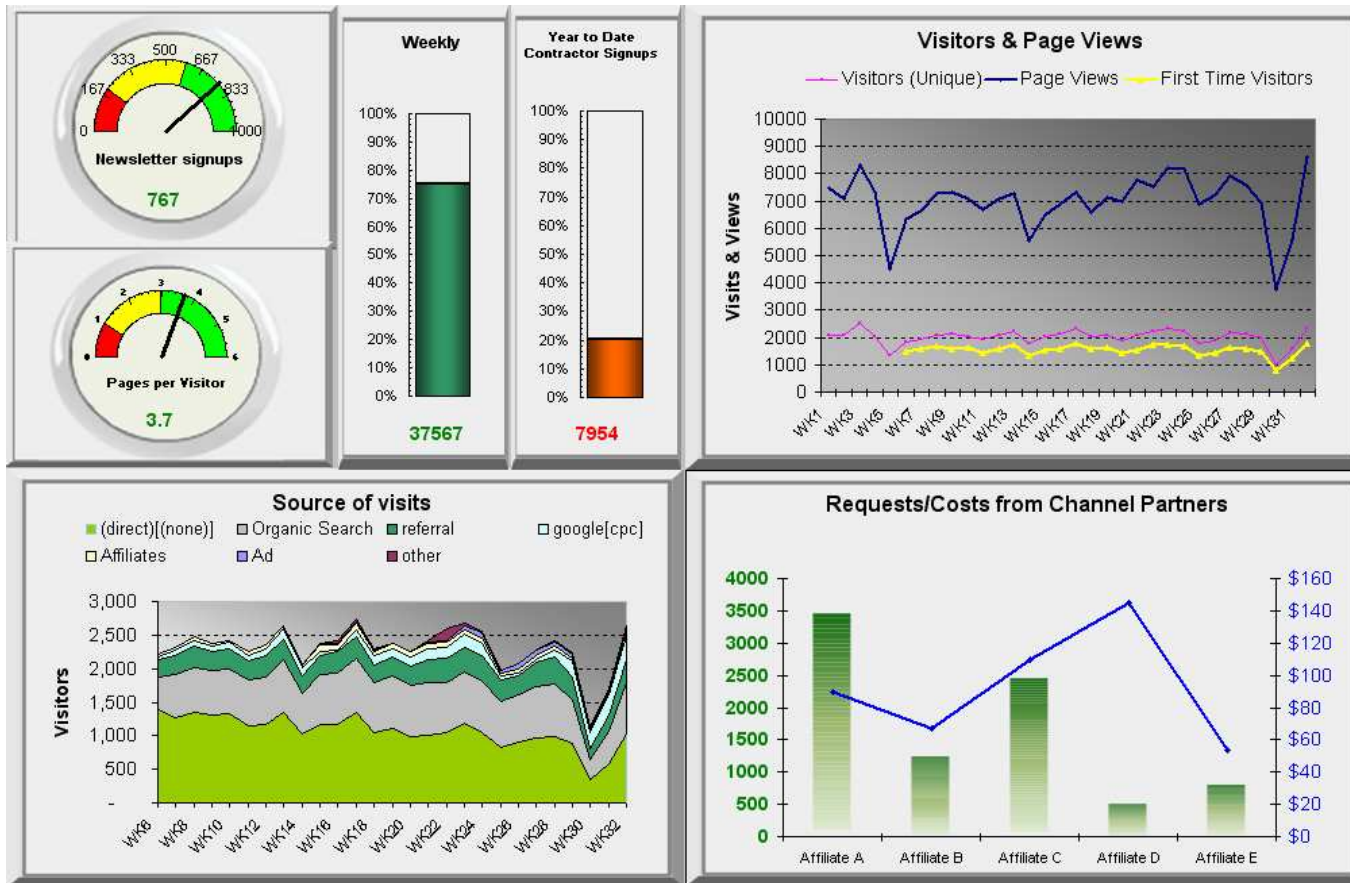
- Weekly reports - Program managers
 - Program quantitative
- Monthly Reports - Management
 - Program quantitative and lead qualitative
- Quarterly Reports - CxO level
 - Summary level historical and predictive
 - Lead funnel reports



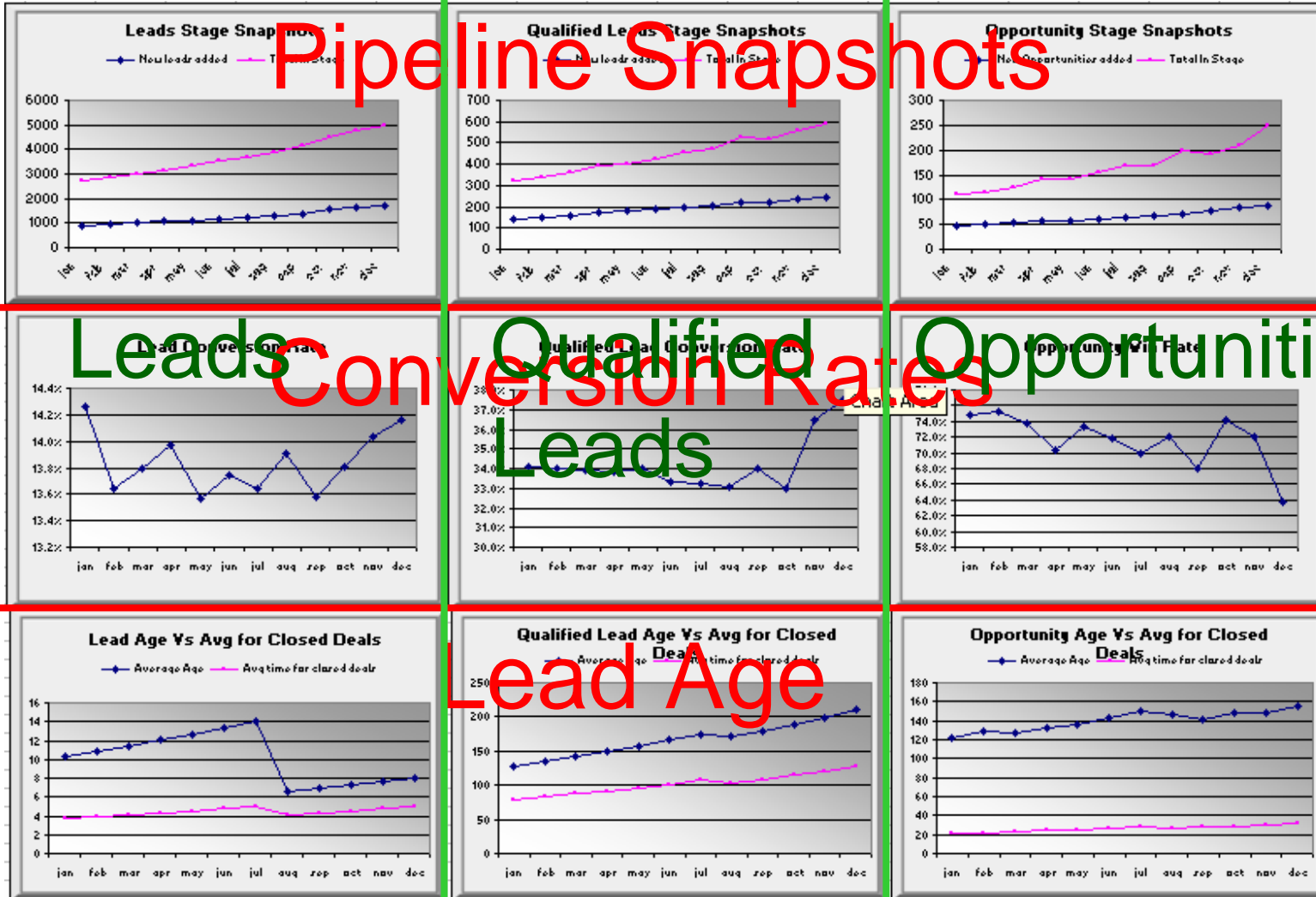
Weekly Marketing Dashboard



Weekly Marketing Dashboard



Monthly/Quarterly Dashboard



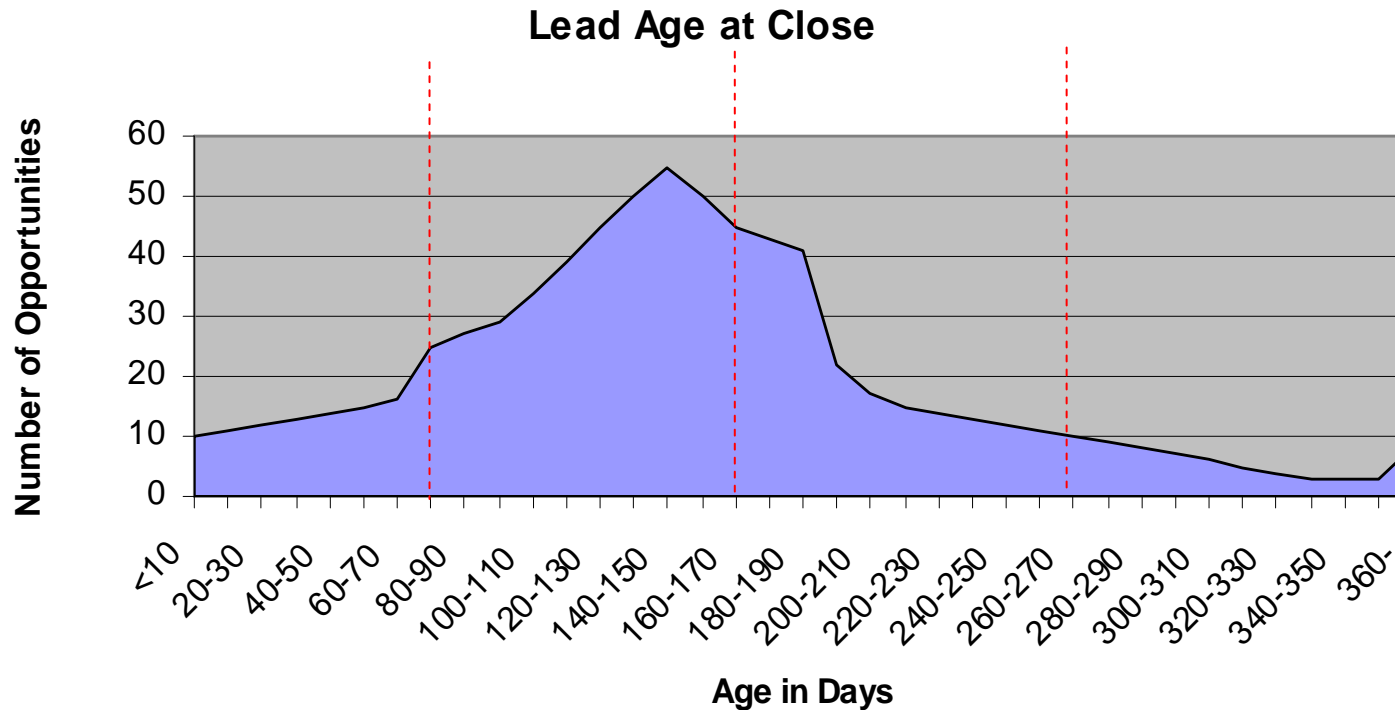
Pipeline Snapshots

Leads Conversion Rates Opportunities

Lead Age



Lead Qualitative Measures

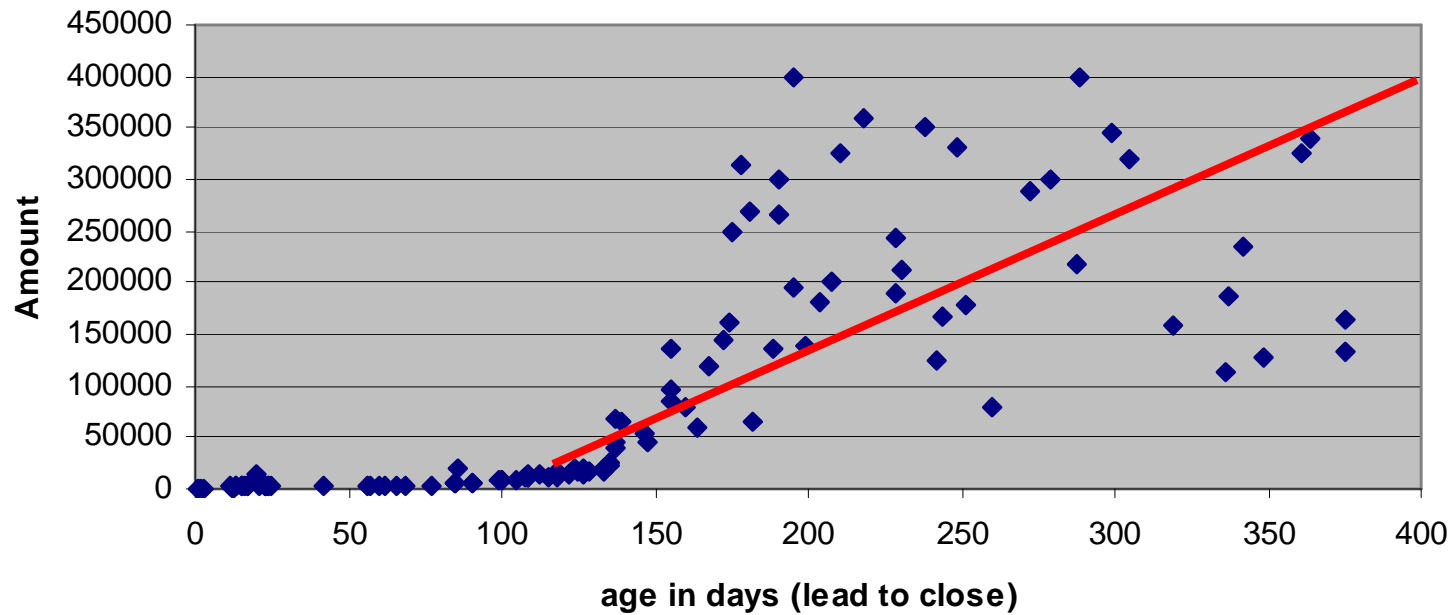


Tells us the degree to which we can affect this quarter



Lead Qualitative Measures

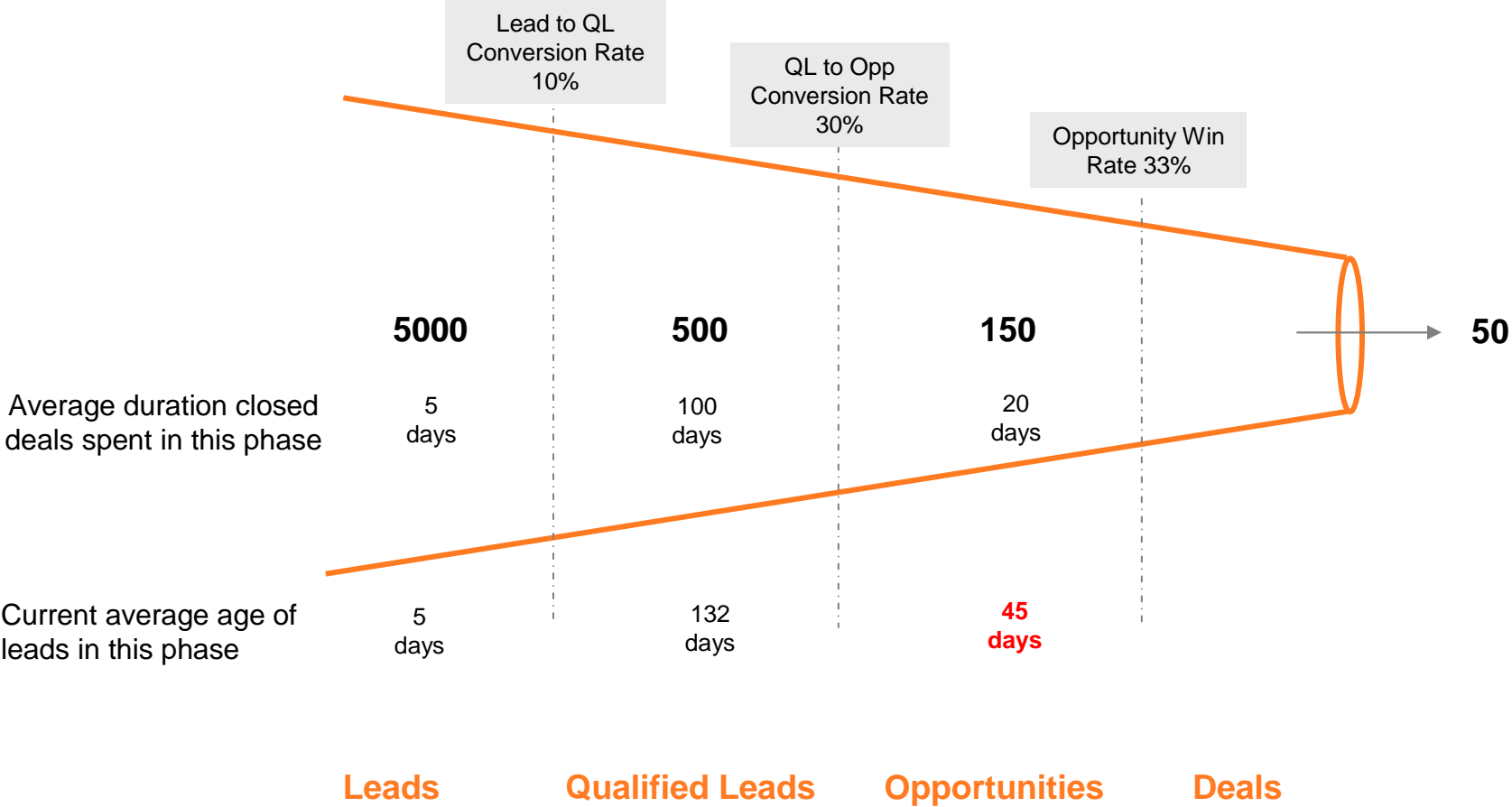
Amount vs Age For Closed Leads/Opportunities



Gives us a measure of the value of the marketing pipeline



Monthly/Quarterly Pipeline Snapshot



Quarterly Business Review

- Rear window:
 - For the business that closed, what were the lead related metrics

- Side Window:
 - Lead generation results from last quarter
 - Are there sufficient leads to meet current quarter forecast?

- Front Window:
 - Revenue forecast and lead need
 - Current quarter lead generation plan



CXO Dashboard

- Lead funnel and forecast
- High level program effectiveness
- Marketing ROI
- Cost of customer acquisition including lead generation, and awareness costs



CMO/VP Marketing

- Number of leads (monthly, quarterly)
- Cost per lead (monthly, quarterly)
- Lead to opportunity conversion %
- Opportunity to sale conversion %
- Cost per order
- Leads per source
 - Tradeshows, DM, E-Mail
- Data richness
- Funnel quality
 - Age, velocity
- Pipeline coverage
 - Do we have enough leads for sales to reach their numbers?



CSO/VP Sales

- Leads funnel snapshot
- Leads generation forecast (monthly & quarterly)
- Revenues per lead source
- Profitability per lead source
- # of marketing/sales touches per closed deal
- Inside vs. Outside Sales Leads
- Sales leads necessary to reach quota
- Leads for new accounts versus existing accounts



Marketing Programs Manager

- Number of leads per-campaign
- Number of Leads per-marketing program
 - Direct mail, E-mail, Banner Ad and Tradeshow
- Cost per-lead (per-program and campaign)
- Number of marketing touches per-qualified lead
- Types and sequence of marketing touches per-qualified lead
- Comparison of lead generation methods
- Quality of leads by source
- Leads by product and by region



Marketing and Sales Process Related to Leads Dashboard



Processes For Success

- Define customer buying process—think like a customer!
- Have a documented lead management process
 - Must have sales/marketing “buy-in”
 - Define “lead” vs “suspect” vs “response” vs “qualified lead”
 - Clearly defined “hand-off” for when marketing passes leads to sales
 - Feedback between sales and marketing to constantly refine process
 - Role definitions for who gets to do what to lead data
 - Tracking mechanisms for lead source
- Lead Management Article: www.rubiconway.com/resources
- Lead Management Webinar: www.rubiconway.com/resources



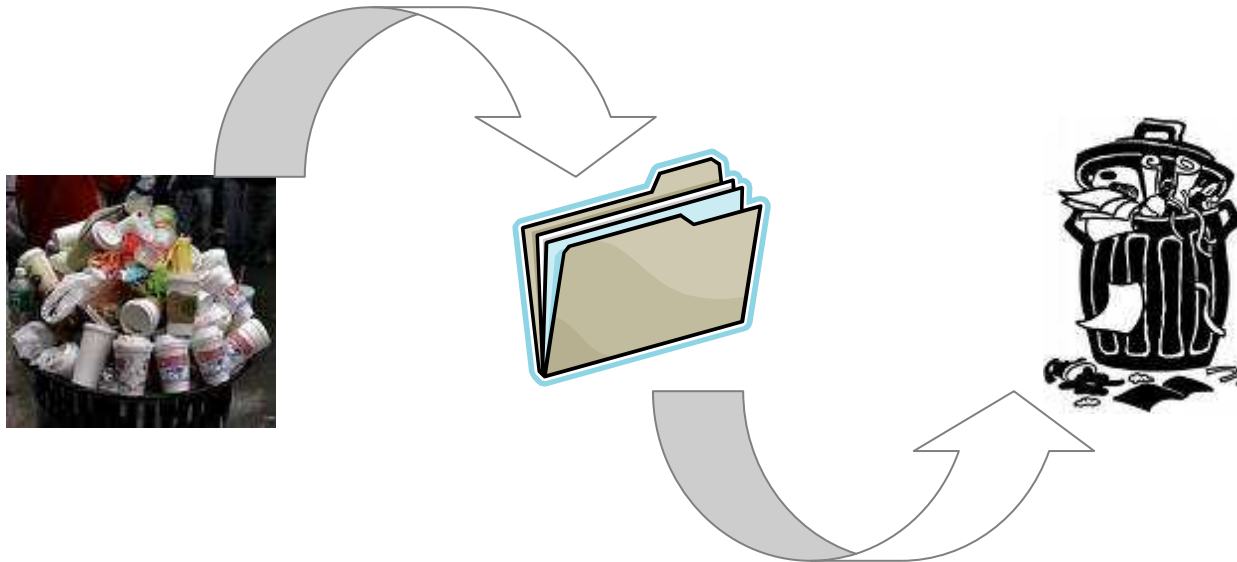
Data Accuracy and Maintenance



GIGO: Garbage in = Garbage Out

“Databases go out of date 1% a week”

– *Direct Marketing Association*



Why Does This Happen?

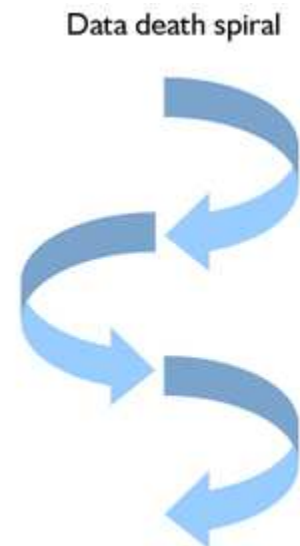
- Lack of internal process
 - Multiple people making changes to the data
 - Lack of understanding with regards to roles and responsibility in data input and alteration
 - No database maintenance plan
 - No accountability for data quality
- Change in contacts – decision makers move and/or change jobs within organization
- Companies move, merge or get sold
- No budget/lack of budget allocated for database enhancement and/or management



The Data “Death Spiral”

Company enhances and improves database

1. Company invests in cleaning up/enhancing database
2. 1% decay of data per week
3. Multiple parties permitted to write/update existing records
4. No rules defined around #3
5. #2 - #3 = Steady decline in data quality
6. Steady decline in database value and utilization
7. Less motivation to add new/accurate data
8. Trust in data accuracy declines
9. Death spiral – fewer users, accelerating age of data
10. 1-2 years later back to #1



Develop a Data Maintenance Plan

- Plan data maintenance for at least every 6 months
- Define rules for who gets to update what and when
- Define rules for de-dupe, validation, and normalization
- Define processes and roles for gatekeepers, data management, importing and exporting
- Define role for data manager held accountable for data quality
- Define data quality metrics and examine them frequently
- Executive level “buy-in” required!
- Get stakeholders involved!

Data death spiral



Measure Data Accuracy

- Measure monthly, quarterly and annually
- Duplicates
 - How many duplicates do I have in my marketing/sales databases?
 - Where are they coming from?
 - Inside Sales
 - Outside Sales
 - Marketing Campaigns
- Returns/Bounces
 - Direct Mail - # of returns, address correction being used, CASS
 - E-Mail – soft bounces, hard bounces, HTML vs Text



Data Normalization and Validation

- Address and telephone validation
- Third party verification
- Company industry and titles normalization
 - Predefined list or custom input fields?
- Company name normalization:
 - IBM, I.B.M. Inc or International Business Machines ?
- Lead source, lead type, and lead status field normalization



Getting Good Data On Every Lead

Lead Type

Analyst/Media
Competitor
Customer
Duplicate
Employee
Other
Partner
Prospect

Lead Source

Employee Referral
Existing Business
Marketing Campaign
Partner Referral
Other
Sales Prospecting
Web
Word of Mouth

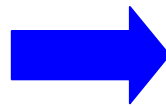
Marketing Lead Source

Ad
Download (WP, webcast)
Event
Forum
Information request
List purchase
Marketing prospecting
Newsletter signup
Not known
PR
Webinar



Results

- More trust in data quality
 - Individual usage and productivity goes up
 - Dashboard metrics provide accurate information
 - Data quality is now tracked and has accountability
 - Expense in data cleansing goes down!



Marketing Automation Drives Quality Dashboards



Technology-Marketing Automation

- **What is Marketing Automation?**

Marketing automation is the use of software to automate marketing processes such as [customer segmentation](#), customer data integration ([CDI](#)), and campaign management.

The use of marketing automation makes processes that would otherwise have been performed manually much more efficient, and makes some new processes possible. Marketing automation is an integral component of customer relationship management ([CRM](#)).

Source: www.searchcrm.com

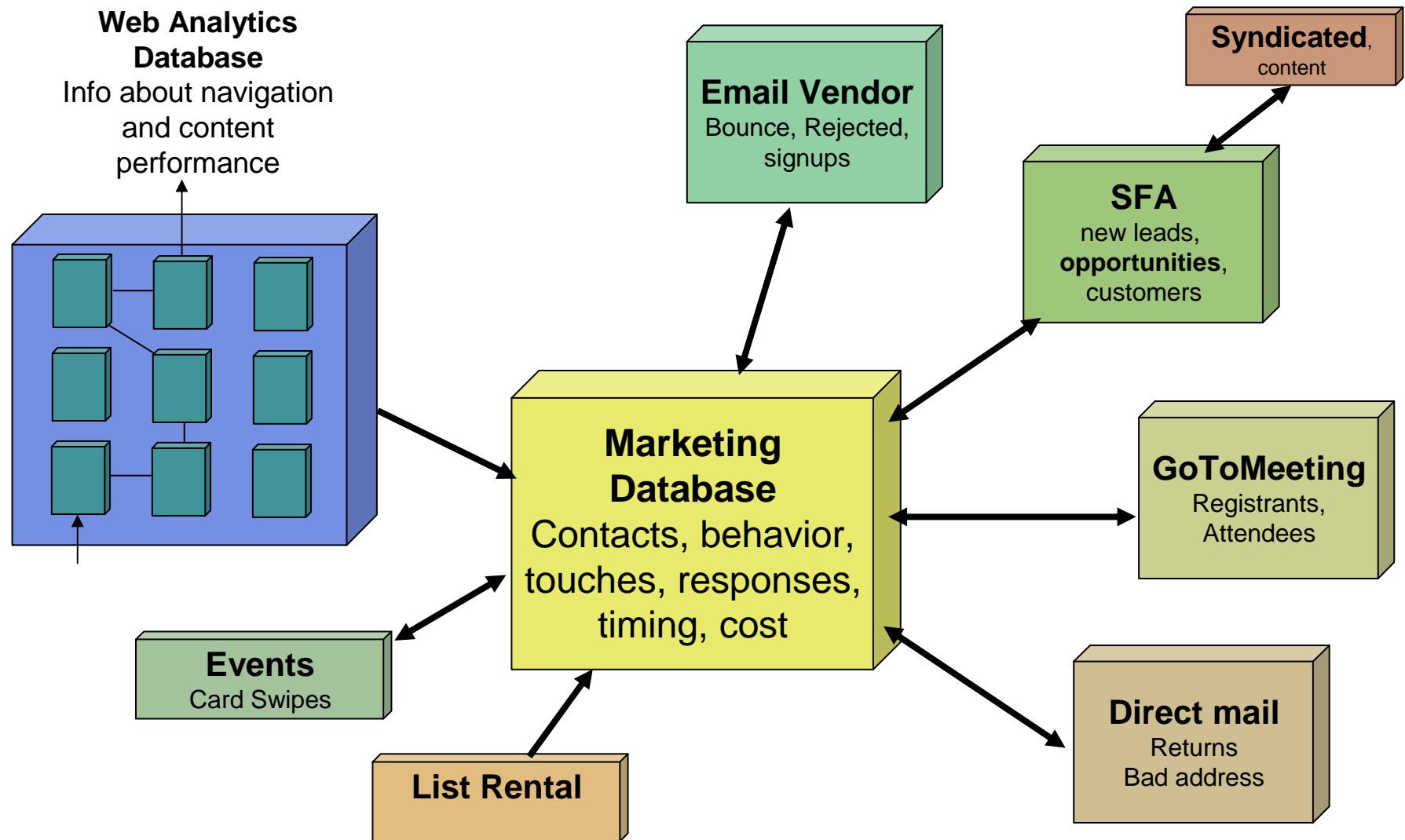


Why Marketing Automation?

- Increase sales and marketing effectiveness
- Automation allows you to do more with less resources!
 - Generate more qualified leads
 - Automated lead scoring
 - Automated lead routing
 - Automate marketing programs
 - Integrated response management
 - Hi-quality data management and validation
 - Every interaction with suspects, prospects and customers tracked
 - Provide content at the right time in the customers buying process
 - Send communications based on pre-defined rules
 - Create personalized web forms and resource centers without HTML coding!
 - Eliminate lead leakage
 - Capture marketing program costs and results
 - Custom dashboards and metrics

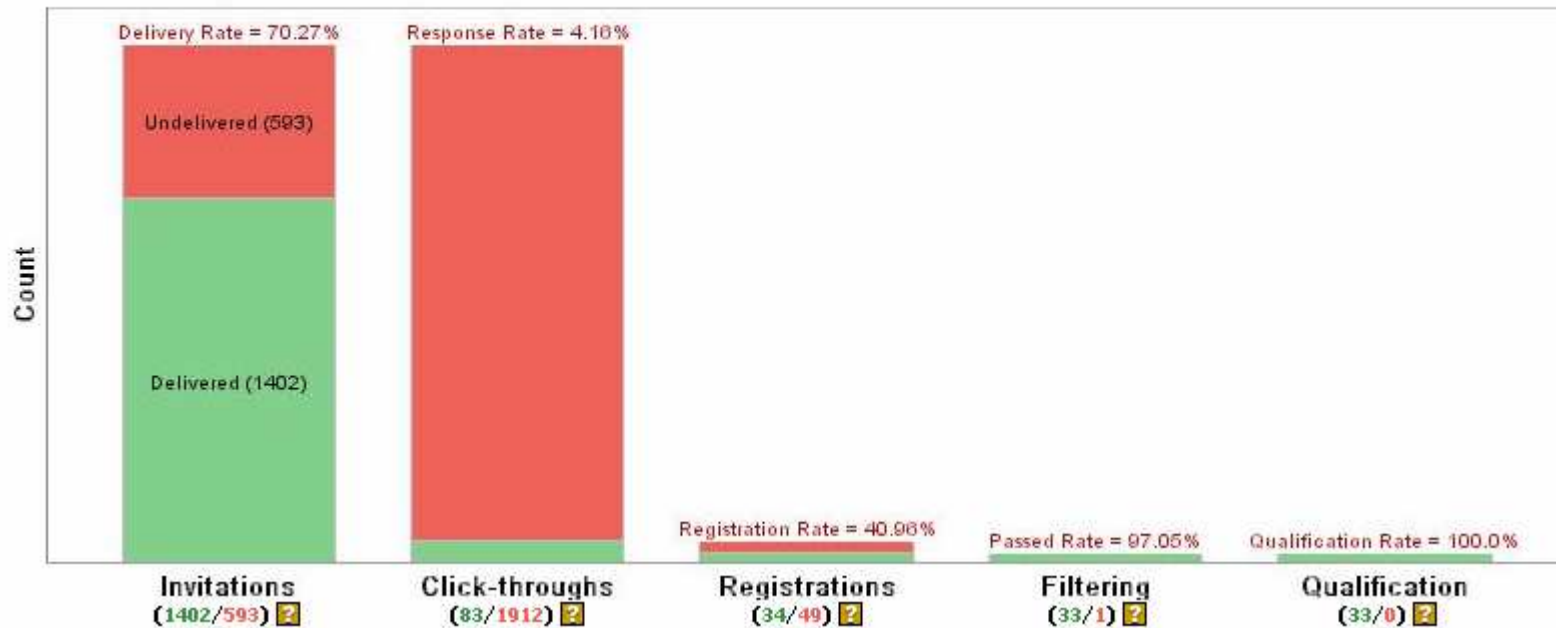


A Single Marketing Database



Sample Report For This Webinar

Lead Funnel Report For April-07 Webinar



Technology-Continued

- Choose the “right” solution for your needs:



www.rightnowtech.com
www.saratogasystems.com
www.essentialssystemslc.com
www.salesforce.com
www.aimpromote.com
www.aprimo.com
www.chordiant.com
www.crmondemand.com
www.interlinkone.com
www.leadgenesys.com
www.marketingcentral.com

www.marketingpilot.com
www.marketsoft.com
www.openbox.net
www.orbisglobal.com
www.soffront.com
www.theconvergent.com
www.unicacorp.com
www.saleslogix.com
www.sugarcrm.com
www.vtrenz.com



Results - Quality Leads Dashboard



Closing Remarks

- Don't expect what you don't inspect
- What you measure gets better
- From Martyn Etherington VP Mktg at Tek:
 - Don't measure it if it isn't actionable
 - Fact based decision making empowers people
 - Don't apologize for incomplete data
- Better quality leads
- More leads
- Shorter sales cycles



Thank You!

For more information, or to contact the speakers directly:

Kevin Joyce, CEO, Rubicon Marketing Group

Kevin.Joyce@rubiconway.com

Robert J. Moreau, Rubicon Marketing Group

Robert.Moreau@rubiconway.com

