Marketing Qualified Lead Generation Workflow

Outbound Telemarketing

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MEDIA DEV

1 DETERMINE THE BUYER PERSONAS YOU WANT TO TARGET

What types of companies (select industry sectors, company size and geographical location) should be profiled? What Job titles (functional line-of-business decision-makers or technical decision-makers) are most appropriate given the subject matter of the assets you want to promote? Maybe you want to focus your efforts on an ABM list of priority accounts. Which accounts have the most potential for your business to include in such an outreach effort? Once you know exactly who you want to target, you can move on to step two.

2 PREPARE DATASETS

Data is a living and breathing organism—it changes all the time. Someone who works for a company one day could leave the next, so it's worth scrubbing your data if it hasn't been used in a while. If you do not already have a proprietary database of accounts that you can tap into for your outreach, you can research companies online, or solicit a third party outsourcer to conduct a data building campaign.

3 CREATE A CALL GUIDE

No-one should ever read a script word for word on the phone, but a guide will indicate the value proposition of the asset or assets you are looking to promote, and should list some qualifying questions in order to determine your audience is concerned by the topic at hand, and truly interested in engaging. The guide should serve as an outline for your callers, highlighting your key messages and your call-to-action. You may also need to include legal statements should you be looking to obtain explicit consent for GDPR compliance in the EU.

4 CREATE AN EMAIL

As follow-up to the call, you should have an email ready with links to download the assets you are promoting. It's nice to reference the phone conversation, give a short explanation highlighting the main topic of the asset(s), and leave your contact details where a prospect can get in touch with you should they want sales follow-up. This email should be created prior to calling so that immediately after you have begun calling to verify interest on the phone, the email can be sent to the prospect. We recommend sending such an email message no more than 48 hours after the initial phone conversation (and 24 hours after is ideal).

5 BEGIN TEST CALLS

The initial calls will help you determine the reactivity rate of the target audience. This will also help you tweak your pitch, determine the most common negatives (that you can then counter argue more effectively), and other difficulties that you may need to work around. By following the lean method for agile marketing, you should test and tweak, test and tweak until you are satisfied that you have your best practice. Once you feel confident that things are working well, you can then scale the activity.

6 EMAIL FOLLOW-UP

Emailing each prospect who has expressed interest in receiving an asset will help "anchor" your lead, and will start the education process. Of course you can track to see who has opened and clicked on the links in your email, and you can conduct follow-up efforts accordingly. While the goal of this type of activity is to identify top-of-the-funnel leads, you may also come across some sales opportunities in the process. Be prepared for your sales team to actively schedule appointments with those leads while they're hot.

Disruptive Marketing for Software Vendors

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