eTrigue

Underperforming to Unstoppable: A Proven Lead Gen Playbook

Speakers

Kristin Carey

Vice President, Partner
Development

eTriigue.

Cathryne Rowe

North American Marketing
Director

WatchGuard®

About eTrigue

- "Thru + With" Channel Marketing Programs
- Platform + Services = Turnkey Programs
  - ✓ Specialize in Channel
  - ✓ Digital Marketing Program Execution
  - ✓ Real-Time "Lead & Company Insights"
  - ✓ Sales Performance Tracking
  - ✓ Creative Team
- Supporting 93 countries
- HQ: Silicon Valley

Clients:

eTrigue®

Underperforming to Unstoppable: A Proven Lead Gen Playbook

Lead Gen Reboot: First 90 Days Framework

Start with Leadership Buy In

- Lead management
- Marketing automation
- Sales pipeline management
- Data hygiene

Current State

- Analyze current process.
- Define ideal process.
- Evaluate current metrics.
- Identify key measurements.

Data Gaps Limit Insights

- Connect tools via API.
- Implement data standards.
- Consistency, Completeness, Conformity, and Currency.

Benchmarks

Track meaningful lead metrics, and benchmark against industry standards for success.

Lead Management Playbook

Define lead stages (Inquiry to SQL) and opportunity influence (by stage), with clear roles and responsibilities.

Clear Strategy Proper Execution

Ensure marketing strategies are efficient *before* increasing spend (time and/or treasure).

Days 1-30: Assessment - Analyzing Your Current State

Start with Analysis

What is our process today?

What should our process be?

What do we measure today?

What can we measure?

What should we measure?

What should we stop doing?

What is our conversion rate by Source?

What is our CAC by source?

What is best by volume/quality?

What is our time to conversion?

What emerging trends matter?

What offer/message performs best?

What audience performs best? ICP?

How can we create standards?

How can we drive more inquires?

How can we increase conversions?

How can we enhance our data?

How can we optimize resources?

Where can we gain quick wins?

Where can we make the impact?

Where are the process bottlenecks?

Where are our competitors?

By Stage By Source Report

Lead Status Count

Row Labels	Count
Converted	29
Dead	855
Evaluation	23
Existing Customer	13
Follow Up	260
In Process Sales Team	92
Long Term Follow Up	365
New	300
Raw Lead	6164
(blank)	18
Grand Total	**8119**

Row Labels	Amount	Count
Marketing Generated	$ 364,680.83	19
Renewal	$4,095,276.15	292
Rep Generated	$ 384,170.36	26
Grand Total	**$4,844,127.34**	**337**

Additional suggested reports:
- Marketing Touched/Influenced
- Opp by Stage by Source (slide 8)
- Consider real time access in Tableau or BI
- Top Campaigns by Pipeline/CW

Leads by Source

Row Labels	Count	Sum of Quote
Conference	239	$ -
CSI	1	$ -
Data Connectors	1283	$ 52,000.00
Educause	12	$ 33,000.00
Pay Per Click	958	$ 468,975.00
ABM	5	$ 33,000.00
ABM Top 50	15	$ 60,000.00
Product	1	$ -
Existing Customer	3	$ -
Gartner Event	1	
General Web	523	$ 651,323.00
Retail Campaign	3	
IDG	195	$ -
ISACA	832	$ 20,000.00
Technical Call	1	
Legal Campaign	271	$ 55,300.00
NRECA	71	$ -
Other	15	$ 32,000.00
Comp Campaign	12	$ 20,000.00
Support Call	1	
Reseller	4	$ 30,000.00
RSA	1063	$ 68,590.00
SANS	808	$ -
Partner	1	
Report	45	$ -
PR	1623	$ -
Hosted Event	143	$ -
RepGen	11	$ 20,000.00
Lunch & Learn	10	$ -
Webinar	19	$ -
Trade Show	7	$ 18,395.00
Unknown	5	$ -
Word of mouth	6	$ 343,000.00
(blank)	22	$ -
Grand Total	**8209**	**$ 1,905,583.00**

Pay Per Click

Web/SEO

Cross / Up Sell

Referrals

Benchmarks

Compare your lead gen metrics to industry benchmarks.

For every 10,000 people that visit your website, 210 will become leads.	For every 210 leads, 101 will become marketing qualified leads (MQLs).	For every 101 MQLs, 47 will become sales qualified leads (SQLs).	For every 47 SQLs, 23 will become opportunities.	For every 23 opportunities, nine will become customers.
.9% to 2.1%	36% to 48%	28% to 46%	39% to 48%	32% to 40%
Leads Benchmark	**MQL Benchmark**	**SQL Benchmark**	**Opportunity Benchmark**	**Closing Benchmark**
The percentage of website *visitors* that convert to *leads*.	The percentage of *leads* that convert to *marketing qualified leads*.	The percentage of *MQLs* that convert to *sales qualified leads*.	The percentage of *SQLs* that convert to *opportunities*.	The percentage of *opportunities* that are *closed*.

Midmarket B2B SaaS Industry

Days 30-60: Building the Magic: Integrated Systems

88% of marketers are unsatisfied with their ability to convert leads, indicating systemic flaws.
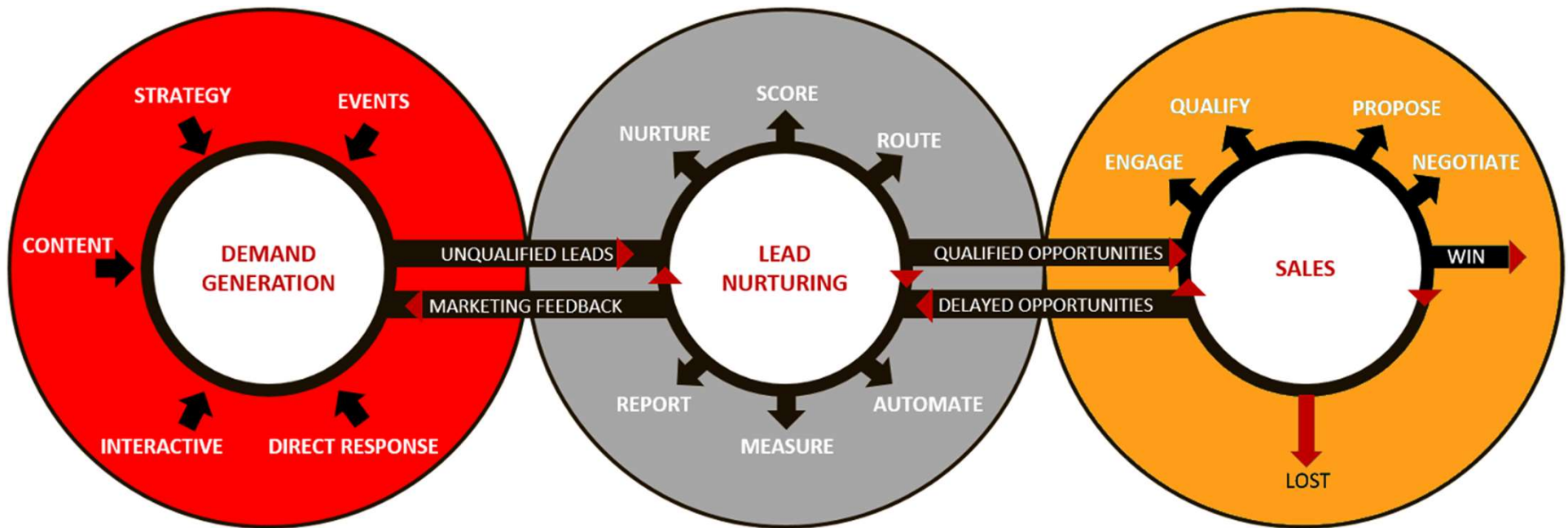
This iterative approach delivers compounding gains, driving significant business growth over time.

Nurtured leads = 45% higher ROI (MarketingSherpa)
Nurture leads for 50% more sales, 33% lower cost (Forrester)

Lead Management Playbook: Start with Definitions

Agree on lead definitions and lead flow process.
Define each stage and what happens at each stage.
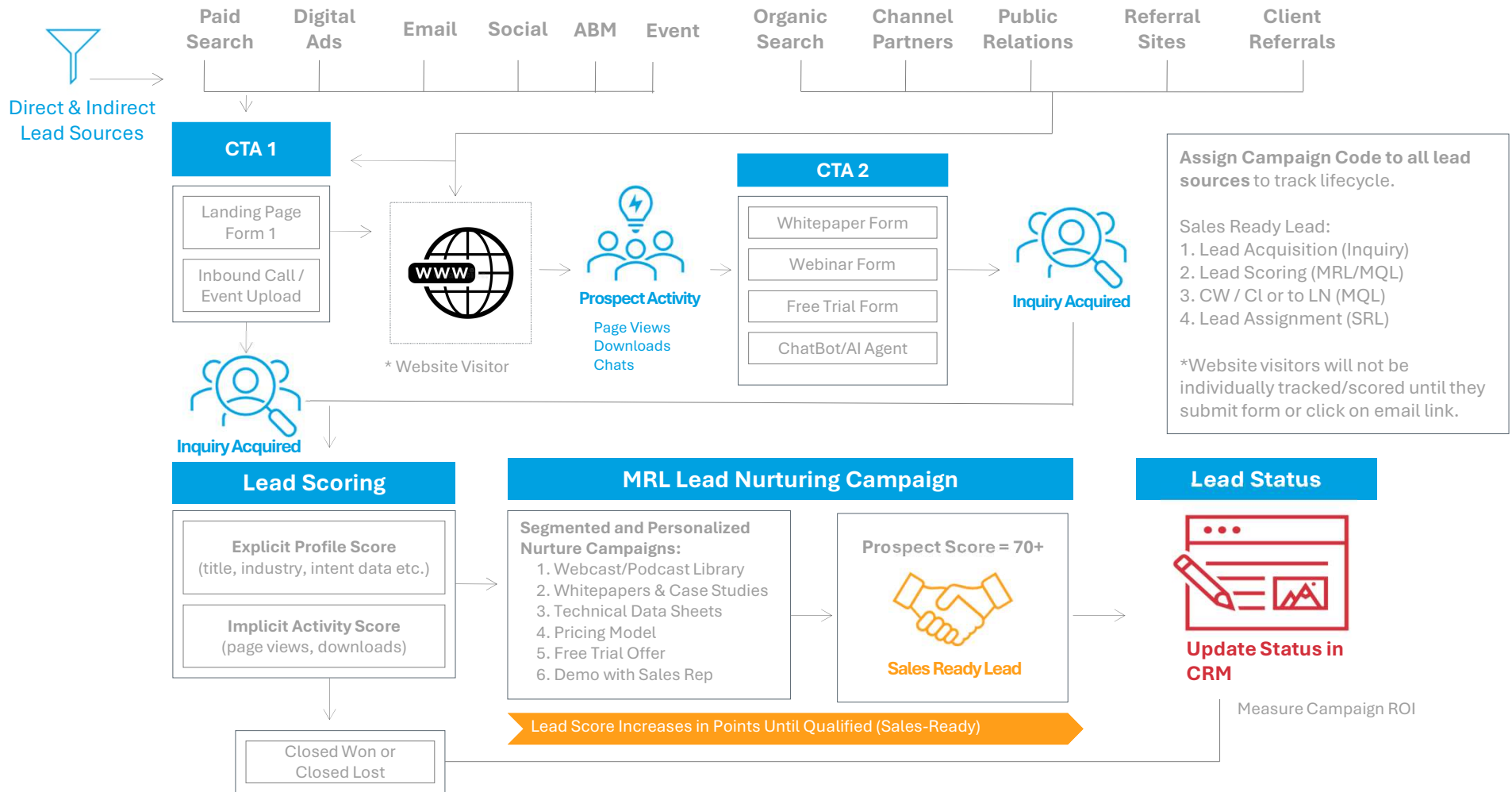Set SLAs around time to action, expected deliverables etc.

Typically managed by Marketing (Marketing Automation Platform)

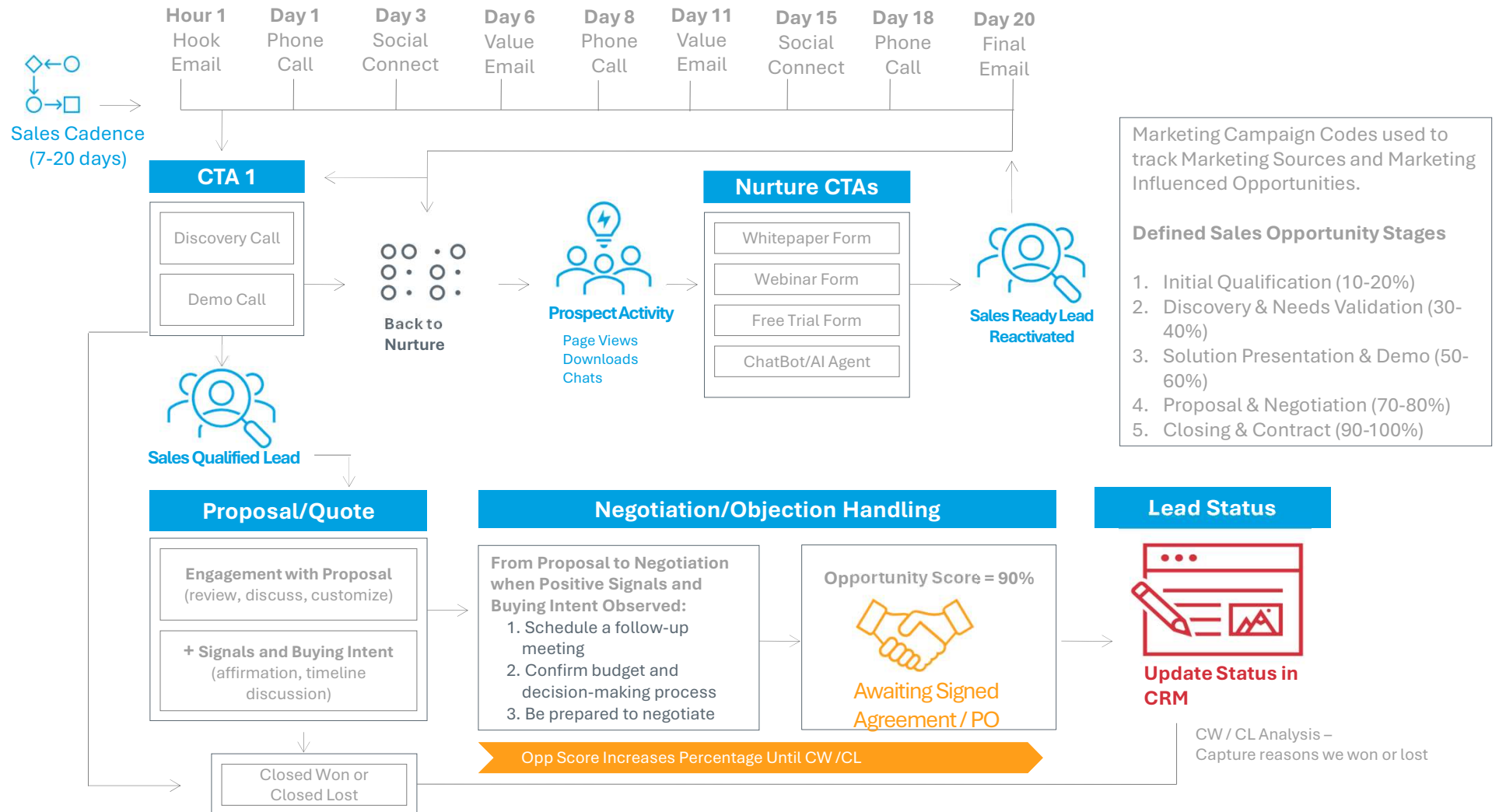| Lead Stage	Definition
Inquiry	• **Definition:** Initial expression of interest via website, email, phone, or event. **Example:** Someone downloads a white paper from your website. **Action:** Automatically routed to progressive profiling drip.
Marketing Ready Lead (MRL)	• **Definition:** An Inquiry ready for marketing activities based on provided basic contact information and some indication of their interests or needs. **Example:** The lead who downloaded the white paper has also provided their company name and job title. **Action:** Automatically routed to best nurture.
Marketing Qualified Lead (MQL)	• **Definition:** An MRL has engagement and meets specific criteria indicating a potential fit for your product/service. This is often determined by lead scoring based on factors like demographics, firmographics, behavior, and engagement. Matches ICP. **Example:** Lead has visited your pricing page and opened several marketing emails. **Action:** Scored/Intent/Augmented.
Sales Ready Lead (SRL)	• **Definition:** An MQL who has displayed strong buying signals and is ready for direct sales engagement. This could include requesting a demo, contacting sales directly, or meeting specific behavioral thresholds. **Example:** The lead requests a product demo or free trial. The BDR team lightly BANT qualified. **Action:** Validate.

Typically managed by Sales - Customer Relationship Management (CRM) Platform

Lead Stage	Definition
Sales Qualified Lead (SQL)	• **Definition:** SRL has been further qualified by the sales team and is deemed a good fit for your solution. This typically involves confirming their needs, budget, and decision-making authority. **Example:** A sales rep has contacted the lead and confirmed their interest, budget, and timeline. **Action:** Schedule Discovery Call.

Opportunity Stage	Definition
Needs Analysis	• **Definition:** Deep dive into the prospect's specific requirements and pain points. **Example:** Mapping out the prospect's current workflows and identifying areas for improvement. **Action:** Schedule Demo/Solutions Review Call.
Solution Presentation	• **Definition:** Presenting your product/service as a solution to the prospect's needs. **Example:** Delivering a product demo or customized presentation. **Action:** Schedule Proposal/Quote Review Call.
Proposal/Quote	• **Definition:** Providing a formal proposal outlining the solution, pricing, and terms. **Example:** Submitting a detailed proposal document. **Action:** Schedule Proposal/Quote Review Call.
Negotiation Review	• **Definition:** Addressing any objections, negotiating terms, and finalizing the agreement. **Example:** Discussing pricing, contract terms, and implementation timelines. **Action:** Ask for the order.
Closed Won (CW)	• **Definition:** The deal is successfully closed, and the prospect becomes a customer. **Example:** The prospect signs the contract and makes the initial payment. **Action:** Capture why we won.
Closed Lost (CL)	• **Definition:** The deal is lost, and the prospect does not become a customer. **Example:** The prospect chooses a competitor or decides not to move forward. **Action:** Capture why we lost.

Lead Flow Model: Inquiry to SRL

Direct & Indirect Lead Sources

Paid Search | Digital Ads | Email | Social | ABM | Event | Organic Search | Channel Partners | Public Relations | Referral Sites | Client Referrals

CTA 1
- Landing Page Form 1
- Inbound Call / Event Upload

Inquiry Acquired

* Website Visitor

Prospect Activity
Page Views
Downloads
Chats

CTA 2
- Whitepaper Form
- Webinar Form
- Free Trial Form
- ChatBot/AI Agent

Inquiry Acquired

Assign Campaign Code to all lead sources to track lifecycle.

Sales Ready Lead:
1. Lead Acquisition (Inquiry)
2. Lead Scoring (MRL/MQL)
3. CW / Cl or to LN (MQL)
4. Lead Assignment (SRL)

*Website visitors will not be individually tracked/scored until they submit form or click on email link.

Lead Scoring
- Explicit Profile Score (title, industry, intent data etc.)
- Implicit Activity Score (page views, downloads)

MRL Lead Nurturing Campaign

Segmented and Personalized Nurture Campaigns:
1. Webcast/Podcast Library
2. Whitepapers & Case Studies
3. Technical Data Sheets
4. Pricing Model
5. Free Trial Offer
6. Demo with Sales Rep

Prospect Score = 70+

Sales Ready Lead

Lead Status

Update Status in CRM

Measure Campaign ROI

Closed Won or Closed Lost

Lead Score Increases in Points Until Qualified (Sales-Ready)

Lead Flow Model: SRL to Close

Hour 1 Hook Email **Day 1** Phone Call **Day 3** Social Connect **Day 6** Value Email **Day 8** Phone Call **Day 11** Value Email **Day 15** Social Connect **Day 18** Phone Call **Day 20** Final Email

Sales Cadence (7-20 days)

CTA 1

Discovery Call

Demo Call

Back to Nurture

Prospect Activity
Page Views
Downloads
Chats

Nurture CTAs

Whitepaper Form

Webinar Form

Free Trial Form

ChatBot/AI Agent

Sales Ready Lead Reactivated

Sales Qualified Lead

Marketing Campaign Codes used to track Marketing Sources and Marketing Influenced Opportunities.

Defined Sales Opportunity Stages

1. Initial Qualification (10-20%)
2. Discovery & Needs Validation (30-40%)
3. Solution Presentation & Demo (50-60%)
4. Proposal & Negotiation (70-80%)
5. Closing & Contract (90-100%)

Proposal/Quote

Engagement with Proposal (review, discuss, customize)

+ Signals and Buying Intent (affirmation, timeline discussion)

Negotiation/Objection Handling

From Proposal to Negotiation when Positive Signals and Buying Intent Observed:
1. Schedule a follow-up meeting
2. Confirm budget and decision-making process
3. Be prepared to negotiate

Opportunity Score = 90%

Awaiting Signed Agreement / PO

Lead Status

Update Status in CRM

CW / CL Analysis – Capture reasons we won or lost

Closed Won or Closed Lost

Opp Score Increases Percentage Until CW /CL

Opportunity By Campaign By Stage Report

SRL to Sales Pipeline

Identify the top performing lead sources by stage, by volume and by pipeline.

Benchmark time in stage by source.

Marketing to Help with:

- **Pipeline Acceleration**
- ABM Awareness
- Content for Decision-Makers
- Case Studies and Testimonials
- Competitive Analysis
- Campaign Analysis
- Product Feedback
- CW/CL Analysis

Count of SSO by Sales Leader by Source

Count of SSO Value (USD)	Column Labels						Closed Lost	Closed Won		Grand Total
	Above the Funnel	Funnel		3-Proposal Development and Delivery	4-Quote Accepted and Verbal Commit	5-Negotiating	6L-Closed Lost	6W-Closed Won	6WP-Closed Won/Order Processed	
Row Labels	0-Above the Funnel	1-Sales Qualified	2-Need Confirmed							
Sales Leader 1	12	33	24	985	69	40	578	720	1134	3595
Source 1	8	13	10	185	5	12	284	79	101	697
Source 2	1	2	5	63	11	7	79	117	129	414
Source 3	3	18	9	737	53	21	215	524	904	2484
Sales Leader 2	35	645	431	1144	143	31	1513	1023	1148	6113
Source 1	9	202	98	44	3	3	473	44	36	912
Source 2	2	110	106	451	61	12	444	458	460	2104
Source 3	24	333	227	649	79	16	596	521	652	3097
Grand Total	47	678	455	2129	212	71	2091	1743	2282	9708

Sum of SSO Value by Sales Leader by Source

Sum of Estimated Price (USD)	Column Labels						Closed Lost	Closed Won		Grand Total
	Above the Funnel	Funnel		3-Proposal Development and Delivery	4-Quote Accepted and Verbal Commit	5-Negotiating	6L-Closed Lost	6W-Closed Won	6WP-Closed Won/Order Processed	
Row Labels	0-Above the Funnel	1-Sales Qualified	2-Need Confirmed							
Sales Leader 1	$9,000	$74,700	$199,843	$17,023,195	$739,474	$255,475	$3,479,141	$4,517,817	$19,530,677	$45,829,322
Source 1	$9,000	$47,700	$86,206	$4,149,590	$62,711	$67,973	$620,139	$676,684	$3,307,994	$9,027,996
Source 2		$2,000	$5,000	$879,530	$49,270	$57,974	$358,875	$504,965	$1,675,381	$3,532,995
Source 3		$25,000	$108,637	$11,994,076	$627,492	$129,528	$2,500,127	$3,336,168	$14,547,302	$33,268,330
Sales Leader 2		$83,084	$418,403	$16,691,743	$1,372,941	$328,058	$2,599,787	$13,347,838	$11,414,946	$46,256,801
Source 1		$5,650	$26,100	$440,241	$18,140	$22,408	$132,448	$396,027	$310,688	$1,351,701
Source 2		$42,410	$227,946	$7,568,023	$659,355	$106,518	$1,990,672	$4,903,655	$5,207,126	$20,705,703
Source 3		$35,024	$164,357	$8,683,479	$695,447	$199,132	$476,667	$8,048,157	$5,897,133	$24,199,396
Grand Total	$9,000	$157,784	$618,246	$33,714,938	$2,112,415	$583,533	$6,078,928	$17,865,655	$30,945,623	$92,086,122

Lead Management Playbook: Also Consider Including

Lead Routing Rules

Sent straight into CRM by MAP for sales immediate follow up.

- Product Evaluation Downloads
- Sales Contact Request
- Demo or Trial Request
- HOT leads events
- Service Call Requests
- Support Call Requests

Direct to Sales Rules

API Data & Website Forms Inputs
- Automatically loads to MAP
- Scored in MAP (Intent Data)

High Value scored Inquiry will be sent straight into CRM by MAP for BANT qualification directly by BBR.

Or, If score does not qualify then it will go into a nurturing program for progressive profiling.

Returning Leads Rules

Returning leads to Nurture. Suggest best Nurture stream for each type.
- Past 90 days with no contact
- Decided on competitor
- Existing Customer - No Opportunity
- Lead is a competitor

Assign consistent codes for reason for return to track and improve over time.

Types of Inquiry Data

Define types of inquiries for consistent prospecting.
- Manual data entry - Event/Activity/ABM generated
- API data entry – 3rd party platforms
- Website – gated content
- Product Eval Downloads
- Service Call Requests
- Support Call Requests

Handover between Marketing and Sales

Marketing to Sales
- Lead has met score criteria
- Pre-qual (must have met lead criteria - BANT qualified):
- Request from Customer for call from rep*

Sales to Marketing
- Accept/Reject within 1 day
- Sales to 1st attempt within 2 day
- Loss with appropriate reason code

CW Reason Codes

Solution effectively addressed customer needs and provided compelling value.
- Strong Value Prop.
- Price/Value Match
- Relationship
- Urgent Need
- Competitor Switch
- New Market Entry
- Expansion (Existing)
- Referral

CL Reason Codes

Deal lost due to factors preventing customer from choosing our solution.
- No Budget
- Price Too High
- No Decision
- Timing Not Right
- Lack of Need
- Competitor Chosen
- Poor Fit
- Unresponsive

How to Find and Add Campaign Code

Rep generated lead at a marketing event. Order placed by 3rd party vendor.
- Marketing Campaign Codes
- Naming convention
- Maintain list in CRM
- Maintain a list Partner Portal

- Add code to CRM and/or deal reg
- Under contact record drop down
- Deal reg select from drop down

Days 60-90: Action - Prioritizing for Maximum Impact

Are we **working on the right things** and are we **doing them right**?

SEO/Web

Top MQL Driver (41%)

- SEO Site Audit (Fix Foundation)
- Optimize content and keywords.
- Set conversion goals.
- Track monthly progress.

Paid Digital

Paid & Social (17% combined)

- Optimize LinkedIn (top source).
- Refine landing pages, lead magnets, CTAs, ad design, (re)targeting.
- A/B test for continuous improvement.

In-person Events

3rd Party & Hosted (18% combined)

- Prioritize by C-suite.
- Build relationships and trust.
- Maximize booth engagement.
- Booth traffic – crack the safe.

Client Referrals

56% MQL Conversion

- Incentivize referrals with rewards (discounts, freebies, etc.).
- Track and optimize program performance.

Customer Emails (cross/up sell)

38% MQL conversion

- Optimize offers and messaging.
- Prioritize personalization.
- A/B test for iterative improvement.
- Best Practices.

Nurture Conversions

Implement personalization

- Refine segmentation, content mapping, Email best practices, timing & frequency, multi-channel nurturing lead scoring & automation, testing & optimization, sales alignment.

Take 5 minutes to get a partner marketing roadmap:

✓ Peer rankings

✓ Personal guide to scale partner marketing

✓ Tips on what to prioritize for the most impact

etrigue.com/report

Thank you!

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Let's meet:

etrigue.com/demo

+1-800-858-8500

Kristin Carey
VP, Partner Development
408.490.2905
kristin.carey@etrigue.com

Cathryne Rowe
North American Marketing Director
cathryne.rowe@watchguard.com