

June 10



# How to be a partner of choice for lead generation and tracking

*Salesgenie CRM++ whitepaper*

Anindya Chatterjee

### How to be a partner of choice for lead generation and tracking

#### Salesgenie CRM++ whitepaper

#### The challenge of delivering the right lead and opportunities to your salesforce

The ideal lead and opportunity program will enable your employees to capture, distribute and track leads - ensuring that every piece of identified opportunities enters your funnel and is acted upon. It will work in partnership with your channel partners enabling you and your partners to track leads together, through to opportunities and bring them to closure.

Today, most marketing programs are held to account basis their ability to generate productive sales leads. Specifically, they need to:

- Demonstrate better quality leads, as evidenced by a higher closure rate.
- Surface opportunities to your salesforce before they hear from the customers; help them be proactive rather than reactive.
- Enable sharing of leads- to the right salesman or channel partner.

With the advent of IT-tools and internet enabling of marketing content delivery, marketing is being asked to automate the whole customer communication cycle as much as possible.

As enterprises look to manage the strategic

processes and the sales function and exit the tactical communication space (read lead generation), it does not mean that lead generation is not important but it is now an activity that has to “earn its keep”. As marketing becomes more metrics-driven, every dollar or Rupee spent has to be justified in terms of “Marketing ROI”, howsoever you define it: by leads, by revenue or customer satisfaction.

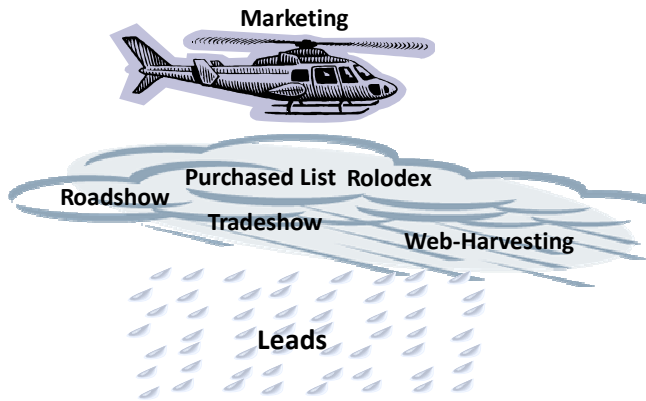
#### The opportunity

If the VP of marketing in an enterprise has taken the strategic call to move marketing out to an external agency; he would want to achieve one or more of the following:

1. Reduce the cost of delivery of programs.
2. Improve ROI and have the metrics to prove it. Help forecasting and justify resource allocation.
3. Have consistency with industry best practices.
4. Have credibility in the lead-generation, lead quality and lead dissemination-accuracy and timeliness.
5. Close loop on marketing effectiveness with data.

Here in lies the opportunity for the VP to effectively outsource the lead generation activities and yet meet his goals outlined above. And the opportunity to you, as a marketing outsourcing service provider is position yourself in this space.

Let us quickly review the traditional view of marketing, which is one of **indirect communication**. The following diagram describes the role:

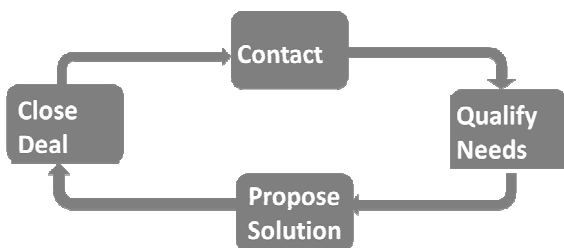


## II. Traditional marketing communication

In the above view, marketing seeds the vast cloud of unknown contacts and produces leads; in the same manner as seeding clouds to produce rain. The leads are handed over to the sales department; who then “convert” them to prospects and then to sales.

**This view is only “half-complete” and with the advent of the internet, can even be misleading.**

For early stage contacts, those with no previous history of contact with your company, this view can hold. But, the more profitable engagements are those that happen with contacts who have been



## II. Traditional view of B2B sales process

“brought inside the circle”, have been “profiled” by demographics, history of past interactions and perhaps purchase history. And, marketing can today leverage internet technology to send very precisely targeted communication to smaller and smaller sets of people.

**So, Sales is today communicating earlier in the sales cycle and Marketing is communicating deeper in the sales cycle. This is key to understanding how Salesgenie CRM++ works.**

**Salesgenie CRM++ has clear roles and access controls defined for marketing and sales roles.** While marketing can see and communicate with all the contacts in the database, irrespective of whichever salesman, sales manager or channel partner it is attached to, it cannot perform the sales functions of taking an opportunity to closure or sending quotes. Sales take the opportunities and leads surfaced by marketing campaigns and runs with them. **This allows a marketing outsourcing provider to provide lead generation and opportunity management services to more than one salesforce; on the same platform.**

**Salesgenie CRM++ allows import and clean-up of external lists really easily** Menu driven easy interface allows easy import of external lists and cleaning up duplicates in accounts and contacts; ensures your sales and marketing executives are not spending hours but minutes cleaning up the contact list. **Salesgenie CRM++ makes communication really simple, by anyone** Salesgenie CRM++ has a strong targeting

# How to be a partner of choice for lead generation and tracking



engine which allows anyone, be it sales or marketing, to select the contacts in the database who are more likely to be receptive to a sales message. What is more, you can create or import your own html email templates for use by users for customizing and sending as their own communications.

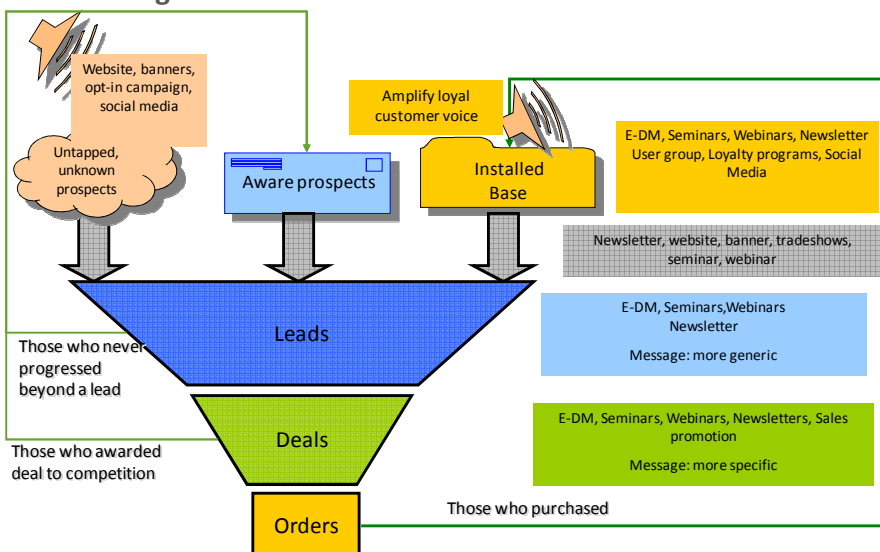
Create your own email- newsletter, email campaign, webinar or seminar invite- and mail them out. Watch the leads flow in.

## Customization is key; Salesgenie CRM++ makes it possible

Salesgenie CRM++ helps map the message to the audience; as big or as small as you like.

So, marketing can run different campaigns for different channel partners, run a campaign for a new product introduction without including those contacts that have deals at an advanced stage for an existing product, they can use the targeting tool to filter those contacts out.

## Salesgenie CRM++ believes the modern customer environment with sales and marketing to be as follows:



**Salesgenie CRM++** makes it possible to not only target a broad audience; it also makes it possible for us to target really small segments of buyers across many companies very cost effectively with messaging that is personalized.

**Salesgenie CRM++** has a powerful targeting tool that helps select the contacts in your database based on their past interaction history and demographics. It thus helps you in sending the message to the right audience. This increases customer satisfaction and sales lead generation.

## Salesgenie CRM++ is extensible

By virtue of being created on industry standard Microsoft Windows 2008 server and SQL Server 2008 in the .Net framework, Salesgenie lends itself to customization for specific tasks that you may have. Contact [sales@anwasha.in](mailto:sales@anwasha.in) for evaluating how we may work together.

### **About the Author:**

*Anindya Chatterjee, has 24 years of experience in marketing, sales and market development in India and large parts of Asia. A B.Tech from IT-BHU and a PGDM from IIM Calcutta, Anindya has substantial experience in design and deployment of marketing and sales processes and tools across geographies, leading cross functional teams and generating revenue. His last assignment was sales head for Malaysia and Thailand with Agilent Technologies. Anindya has designed, deployed, led the adoption and actively used 3 CRM systems of varying complexity in both sales and marketing leadership roles.*

*Anindya founded Anwesh CRM Pvt Ltd, a B2B CRM software product company, based out of New Delhi, India. Anwesh's first product Salesgenie CRM++, a Software available as Service over the internet, aims to make CRM easy, effective and affordable.*