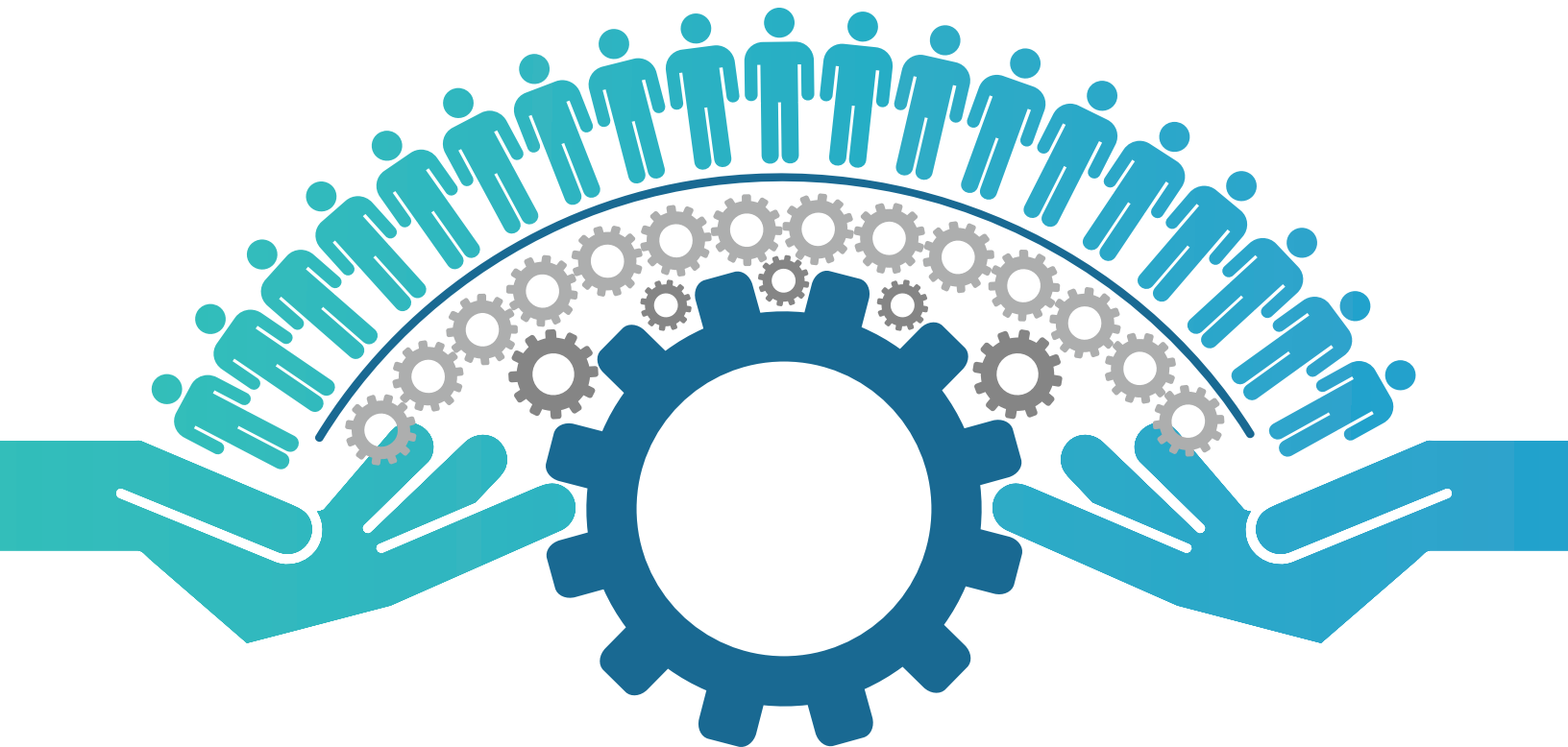TechTarget Best Practices

The Lead Handover: Your Lynchpin for Marketing and Sales Success

A guide to building a top notch lead handover process

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Lead, handover, and process—three seemingly innocuous words. Put them together and suddenly you're talking about the most likely culprit behind the ultimate success or utter failure of most marketing and sales organizations.

What exactly is a lead handover process you ask?

It's the way marketing delivers leads to sales and how sales then follows up with those leads. Creating a thoughtful and well-constructed process for generating and handing off leads is a key component of aligning your marketing and sales organizations, and companies with well aligned marketing and sales teams win. According to the Aberdeen Group, companies with strong alignment see a 20% annual growth rate whereas companies with weak alignment see a 4% decline.

A critical step in constructing your lead handover process entails defining and getting consensus on a lot of different elements—from the definition of a lead and what attributes and activities constitute its makeup, to what data matters and who does what along the way. It can often feel daunting. To help you get it right, we've teamed up with Fresh Brain Marketing, a marketing and sales operations consulting shop, to help you build and execute a framework that makes this herculean effort more meaningful and more manageable.

The lead handover prototype

Building an effective lead handover process requires getting a lot of people in different roles with different priorities on the same page, from the marketing and sales leaders who manage the teams to the various team members who execute against its deliverables. There's nothing worse than having someone pop up in the 11th hour with a critical need or concern that derails your progress. To help keep your lead handover train on its tracks, we'll show you how to build a prototype that gives your stakeholders something to react to and test out, resulting in better feedback and ultimately, faster progress. We'll refer to this as your "lead handover prototype."

Getting your lead handover prototype scoped and constructed entails an extensive exploratory process—getting answers to a series of questions from your marketing and sales teams. The answers to those questions are the most critical part of this process. Ultimately those answers lead to a flow chart depicting your entire handover process, the SLAs

(service level agreements) and other rules established along the way. This flow chart will eventually get signed off by all your stakeholders, resulting in a working model (or prototype).

You'll then take that prototype and build it out in your CRM sandbox. With an actual working model in the sandbox, you can present it to stakeholders using real data and walk through use cases. Everyone gets a chance to touch it, take it for a "test drive" and approve/request changes. But most importantly, it's a working prototype that usually reveals use cases and scenarios not considered during the discussion phase.

Building your lead handover prototype

To build the right process, you'll need to get the most thorough understanding possible of your organization: each department's goals, needs and roles in driving the business forward. To paint the most complete picture possible, we break the exploration down into 5 key areas. Let's explore them:

1. Specifying roles and goals

While revenue is a priority for every business, how marketing and sales teams are driving towards it can often be at odds. An important part of your exploration entails understanding sales goals and how various sales teams are organized to achieve them so marketing can ensure its efforts are set-up to generate and pass along the right set of deliverables.

Questions to explore:

- What are the sales organization's overall goals (i.e. a number of key growth accounts, generating X new clients, growing Y existing clients, etc.)?
- How do these goals break down by month, by quarter, etc?
- Are there multiple divisions or selling teams within sales? If so, what is each focused on and when?
- What are marketing's goals? How is it structured? Who does what and how is marketing aligning to sales objectives?

> **Failure to align sales and marketing teams around the right processes and technologies costs B2B companies 10% or more of revenue per year**
>
> **BizSphere** via Kapost

2. Defining the target

You need to nail down exactly who you are trying to reach with both your marketing messages and sales efforts—and by "who" we don't just mean titles—what kind(s) of companies and what kind(s) of people? Creating buyer personas is a part of this process.

Questions to explore:

- What types of organizations (i.e. company sizes, locations, industries, etc.) fall into your target market? Are there typical situations for these companies that make them better candidates for your solution(s) (i.e. type of infrastructure, financial situation, complimentary technology installed, etc)?
- Which individuals within those organizations are typically a part of the buying team? What is each responsible for and what are his/her unique pain points that your solution solves?

3. Dissecting an opportunity

Opportunities don't just appear, they're discovered. That discovery typically starts with a journey from prospect to lead and then onto some level or levels of qualified lead (MQL, SQL etc.) and ultimately on to opportunity. You may use a different vocabulary to define the stages but the goal of this part of your exploration is to "define" what constitutes each of the stages in the prospect journey (including defining the exit and recycle points).
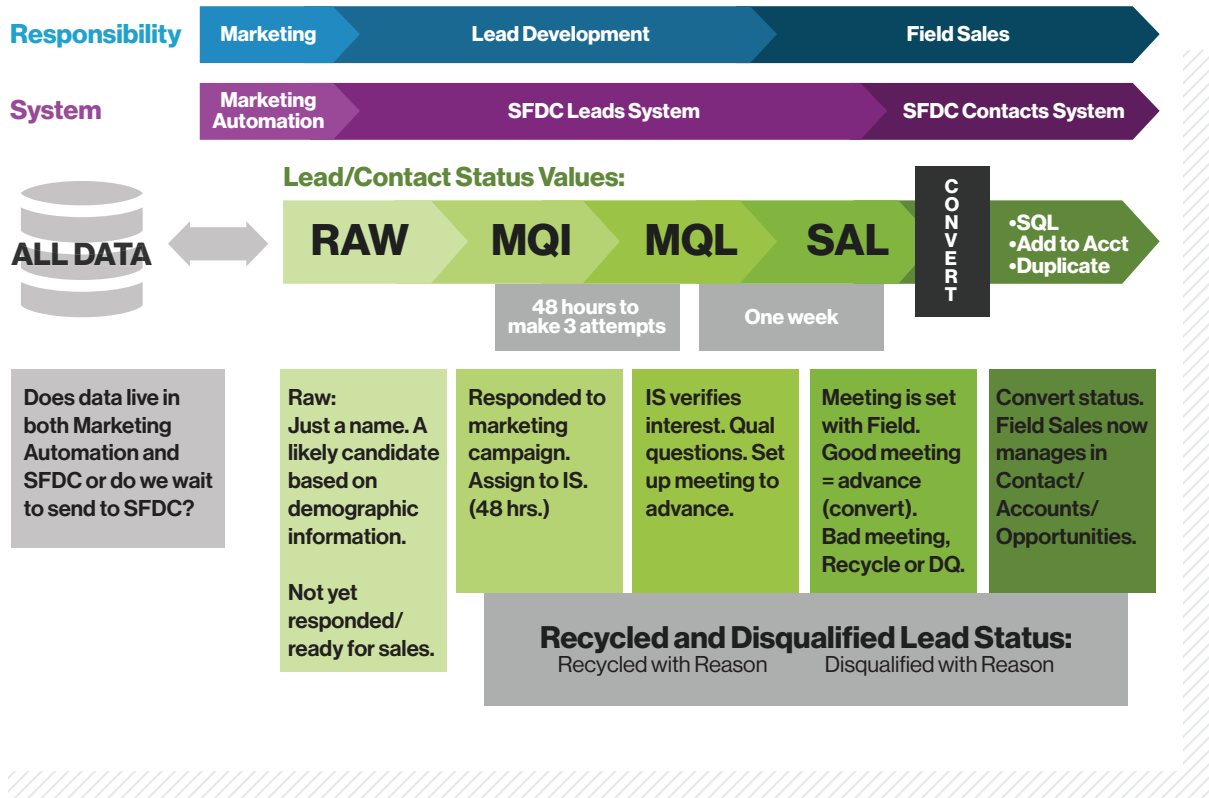
Questions to explore:

- How do you define a lead? What's the difference (if any) between a prospect/contact and a lead? Are there demographic/firmographic qualifiers? Behavioral qualifiers? Etc.
- What is the difference between an MQL and/or SQL and a lead? Are there specific content interactions (i.e. a trial download/other trigger content) that constitute qualification? Is there some combination of activity or demographic/activity combination that transition a lead to a qualified status?
- Are there multiple definitions of what constitutes "qualified"?

4. Detailing qualification

Now that you have your definitions sorted out, it's time to determine the progression—how it unfolds and when. A standard qualification model details how you'll move a lead through to opportunity, who is responsible for what elements of that progression and any special considerations.

Lead handover model example(using marketing automation and Salesforce.com).

Responsibility	Marketing	Lead Development	Field Sales

System	Marketing Automation	SFDC Leads System	SFDC Contacts System

ALL DATA

Lead/Contact Status Values:

RAW → **MQI** → **MQL** → **SAL** → **CONVERT** → •SQL •Add to Acct •Duplicate

48 hours to make 3 attempts   **One week**

Does data live in both Marketing Automation and SFDC or do we wait to send to SFDC?	Raw: Just a name. A likely candidate based on demographic information. Not yet responded/ready for sales.	Responded to marketing campaign. Assign to IS. (48 hrs.)	IS verifies interest. Qual questions. Set up meeting to advance.	Meeting is set with Field. Good meeting = advance (convert). Bad meeting, Recycle or DQ.	Convert status. Field Sales now manages in Contact/ Accounts/ Opportunities.

Recycled and Disqualified Lead Status:
Recycled with Reason   Disqualified with Reason

Requirements for building your qualification model

Define each step

You'll need to define each component of the qualification and determine what it takes to move from one step onto the next. You will also need to establish the rules and treatment for when a record exits the qualification process.

Assign responsibility

An effective lead handover model makes it crystal clear who owns a record at each step and how much time they have to act. The model allows management to monitor aging every step of the way. Make sure you're applying those responsibilities so each constituent is clear on his or her role in the process.

Outline SLAs

More and more smart organizations are creating service level agreements between marketing and sales teams. While this may seem a bit formal, it literally forces departments to sign up to hit certain benchmarks – for marketing, things like new prospects or new MQLs; for sales, things like SALs, SQLs (Sales Qualified Leads), lead follow-up time and opportunities created.

Identify special circumstances

Since all companies are different (from org structure, to go-to-market strategy, channels, timeframes, etc.), it's critical to try to think of special circumstances ahead of time. But, we also recognize the need for flexibility. So, the teams involved in building a lead handover model should plan to come back together from time-to-time to review how statuses are going and where improvements can be made. An effective lead handover model is a work-in-progress.

Questions to get started:

- Does sales want all leads or only qualified leads? Are there certain divisions of sales that want access to certain types of deliverables? What about marketing?
- Should there be a scoring methodology that dictates what leads go to which departments and when? It's key to come to an agreement about whether marketing should try to "score" the leads as a part of their qualification. If you decide a scoring approach is right for your process, you'll also need to spend some time determining that methodology (much more on the scoring in Step 2).
- When does lead handover happen? You'll need to be specific about when a lead gets passed over from marketing to sales.
- How many steps are involved in that qualification process? You can present a standard qualification model, which includes steps and requirements for moving from one step to the next. Or, you can easily modify a standard model for an organization's specific needs.

5. Itemizing the score

Assuming you've determined a score that makes sense for your team, figuring out what constitutes the score is the next step in building your lead handover process. Lead scoring allows marketing to essentially stack-rank leads for sales based on key information (activities taken by the prospect and demographic detail) you have on those leads and their accounts.

> **Only half of marketing and sales organizations have an agreed upon, formal definition of a qualified lead**
>
> **CSO Insights**

What kind of information can be used for lead scoring?

This is the fun, albeit tricky, part—literally anything you can think of as long as you can effectively quantify it on a repeatable basis. Generally speaking, the inputs to your scoring methodology can be organized in to two groups—demographic and behavioral.

Here are some examples:

Demographic	Behavioral
Job title	Viewed demo
Number of direct reports	Read a white paper
Department size	Watched a video
Company geography	Read a blog post
Company revenue	Subscribed to the blog
Website traffic	Asked to be contacted
Industry	Viewed the pricing page
Number of employees	Shared through social media
Age of company	Spent 5+ minutes on site
Tracked activity	Made 3 unique visits to site within 7 days

Sales and marketing should be thoughtful about establishing a smart lead scoring methodology, determining which of the inputs matter, and what value to assign to each.

Another point to consider is whether or not you want to include what's called "negative scoring" (e.g., perhaps a customer who purchased a competitor's solution in the last 3 months is a less desirable lead and should have points deducted from his/her score).

For a deeper dive on scoring, check out Marketo's Definitive Guide to Lead Scoring.

Implement a way to manage the data

Congratulations! You've gotten through the hardest part. Now it's time to get into the nitty-gritty tactics of delivering on your lead handover vision, which is largely centered on the data. Your handover process, as you've learned through your exploration process, is heavily dependent on your ability to see and use the necessary data effectively. There are three specific areas you'll want to pay attention to as you work through setting up your lead handover: lead source, segmentation, and data accuracy.

Standardizing your lead sources

Your leads are coming from any number of different sources — a syndicated white paper, a blog post stumbled upon through a Google search, maybe a trade show, or perhaps even a cold call. Part of creating an efficient lead handover process is leveraging the channels that deliver the most leads (based on the definition you've agreed upon) and greatest opportunity for those leads to become qualified. Therefore, as a marketing organization, you'll be measuring your marketing based on these lead sources. That means you'll need to have a standard set of lead sources to conduct that analysis accurately.

We suggest that determining your lead sources is based on your answers to one fundamental question: how do you go to market? In answering that question, you'll identify the various channels you leverage which you can then categorize into a list of lead sources.

You'll want to make sure that you have the ability within each of these groups to dive deeper where necessary. For example, within "Advertising" maybe you leverage "Adwords" and "Display" or maybe within "Social" you want to dive deeper into what was derived from LinkedIn vs. Facebook.

Once that list is determined you'll want to take three specific actions

1. Migrate existing records to the new sources,
2. Attach those records to campaigns, and
3. Put controls in place to make sure the new values are the ones that get used.

Here is a simplistic list of lead sources

Advertising (Adwords, display ads, remarketing)

3rd party website

Event

Inbound

Sales sourced (use for any names your CRM users add)

Referral (use for Customer, Partner, Employee referrals)

Social

List purchase

Email campaign

Segmenting your database

Based on your lead and qualified lead definitions and the overall qualification process, you'll be able to get a good sense of how best to "group" prospects. Perhaps it's by industry, or company size or maybe even current technology stack. From there, you'll be able to test out different remarketing and nurture strategies to determine the right recipe for driving more qualified leads. During this process it's important to make sure you're not only set up to capture the data to segment effectively, but also to capture the qualification activities and scoring inputs as they're attained.

Maintaining data accuracy

As hard as you may try, you'll still end up with some bad data along the way. You'll want to account for that within your system. For example, you need a plan for handling leads that are owned by inactive users, contacts that should be leads, and lapsed leads and contacts. Many organizations have never validated email addresses. Ensure regular email validation and cleansing and if necessary, consider data cleansing tools or services. In the end, it will vastly increase your efficiency, saving you time, resources and even storage costs.

Execution, training and roll out

At this point in the process, you've done your homework, gotten buy-in, established your process and validated the data, now it's time to roll up your sleeves and build.

Sandbox build

To get started, you'll want to build your now itemized lead handover process in a test environment to give team members access to test it out.

Key stakeholder review

Once you have your new lead handover process all set up in an environment where people can actually see it, then it's time to reconvene the key sales and marketing stakeholders for a review. Because the sandbox contains a copy of your real data, the handover process will function just like the real thing. Stakeholders will be able to see how it fits into their real day-to-day conditions—this ensures the feedback is meaningful and actionable. Take any feedback and tweak your process as necessary.

Sales and marketing training

Now that you have the sandbox environment, you can also begin the process of educating the sales team about the lead handover process. You'll want to provide an explanation and overview of the system, clear definitions on all terms (e.g. what constitutes a qualified lead, your scoring methodology and inputs, etc.).

Documentation

While training is great, you can bet that employees will need to go back for refreshers. Create clear-to-understand, bite-size training documents and/or screencasts to give your employees a reference center to master their understanding of the lead handover process.

Go-Live

Ok, now it's time to take the training wheels off. You'll be moving your lead handover process from the sandbox environment to the "production" environment. Obviously, you'll want to pre-announce this to your entire marketing and sales team and have a plan in place about how you'll answer all questions/handle all issues that arise in the early days after rolling out your lead handover process.

Re-training and new hire training

It's important to continue to reinforce the new process. We often suggest being a guest speaker at regional and national sales meetings. Additionally, you'll want to make the lead handover process part of how you on-board new sales and marketing staff.

Governance

It's important to watch what's going on and communicate about the things that are going right and wrong. Reporting will show you who is following the new process, and who isn't. You'll quickly want to identify if the service level agreements are being followed.

> **Marketing's new imperative is Sales support…moving from nurturing leads to creating a shared customer context**
>
> **Laura Ramos**
> Vice President
> Principal Analyst
> Forrester
> Idio

Report distribution and dashboards

When you think about it, all this work is really for the bigger effort of identifying effective ways to measure and manage the marketing and sales functions. If we've done a good job setting up our lead handover process, we can develop some pretty amazing reports, including waterfall management reports, sales management reports and a whole slew of different marketing reports.

To make sure the organization is actually using all this valuable information, we need to establish a regular cadence of reporting. Management should come to expect a certain set of reports and dashboards, and they should be using them to help execute on their business plans. In high-functioning organizations, a regularly scheduled check-in between marketing and sales—during which these dashboards are reviewed and discussed—is standard operating procedure.

Wrapping up

Engineering (or re-engineering) your lead handover process is no small undertaking. And for many of the questions you need to answer, there are no sure-fire bets. There will likely be a mix of quantitative analysis and personal judgment involved in many of the decisions that get made. It might also require tough conversations between marketing and sales.

It's quite common for organizations to bring in an outside consulting company to help them with the implementation of a lead handover process. The experience consulting companies have setting up these processes and systems for many different organizations—as well as their status as impartial consultants—can be immensely valuable.

While setting up a thoughtful lead handover process can be intimidating, when done well, it positions the company for long term success, and allows both marketing and sales to truly measure their impact on the business.

TechTarget

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Craig started Fresh Brain Marketing after working in just about every marketing role and level during 20+ years with companies such as Eloqua, Gomez, Brainshark, Monster, Be Free/ValueClick, and Iron Mountain. Fresh Brain Marketing helps companies execute marketing faster and deliver better results. Their expertise is in marketing/sales operations and demand generation using best-in-class technologies like Marketo, Pardot, HubSpot, Salesforce.com, and others. Key to client success is helping marketing and sales departments understand the lead handover and qualification process—and making sure that process is supported by CRM and other platforms like marketing automation.

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Courtney is a marketing professional focused on helping technology brands understand their buyers, evolve their infrastructures, and create the content that will drive the connections that result in a stronger bottom line. She currently serves as Vice President of Field and Product Marketing for TechTarget. Having invested over a decade in the publishing and media industries both domestically and abroad, Courtney is responsible for informing and carrying TechTarget's products to market. Her background in demand generation, branding, and nurture, coupled with a passion for marketing have her consulting with various B2B technology brands to help them build and optimize their go-to-market and content marketing strategies.

About TechTarget

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TechTarget has offices in Atlanta, Beijing, Boston, London, Munich, Paris, San Francisco, Singapore and Sydney.

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