Stop Driving Leads, Start Driving Revenue:
A Practical Guide

Step-by-step instructions to transform your marketing organization from just generating leads to consistently driving opportunities and revenue to grow your business.

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Situation:

The advancement of big data has led to new marketing challenges

With the rise of data-driven marketing, the pressure to prove results from your marketing investment has increased. This has led to significant growth in digital marketing and an explosion of new technology allowing marketers to measure what impact their investment is making. For eCommerce businesses, this means revenue data is readily available with clear attribution using Google Analytics or another standard web analytics platform. However, if your business is not driven by eComm, tying your marketing investment to revenue is more complex.

Problem:

If you're in the business of generating leads, proving your ROI can be difficult

While many marketers in lead-based businesses can measure the "conversions" or "leads" their activities create, there is often a big disconnect in measuring the opportunities and revenue those leads ultimately turn into. Tying marketing activity to revenue is plagued with challenges which manifest themselves in many ways:

01 An inability to clearly demonstrate the impact that marketing has on the success of the business

02 No visibility into which marketing activities effectively generate revenue and which ones don't

03 Setting goals and budgets is mostly a guessing game

04 Very little quality control of leads

Executive **Summary**

Solution:

Shifting to a demand-gen approach allows you to focus on driving revenue, not just leads

We define demand generation as the practice of executing holistic marketing programs that engage all target audiences to activate them into and nurture them through the sales process, with all activities measured and optimized on their ability to generate revenue. We've found that most organizations need to go through five discreet steps to make this transition:

01 Install a closed-loop measurement system

02 Create modeling that allows you to understand your business from a sales/revenue perspective

03 Define all marketing audiences

04 Develop a comprehensive communication strategy for each audience

05 Continually report on, analyze and optimize the system

Result:

With a solid foundation of demand generation, you can turn big data into big revenue

By leading your marketing organization through these 5 key steps, you will be well on your way to transforming your marketing activities into a high performance revenue generating engine. You'll have a clear understanding of what marketing contributes to the business, how to continue improving it, and what type of budget and resources you'll need to confidently and consistently hit your goals.

New Expectations
of Marketing Leaders

The rise of digital media has caused a shift in the expectations placed on marketing. Marketing is now expected to be a revenue generation engine, instead of simply a "cost of doing business". Due to the abundance of data that comes with digital marketing, senior leadership expects marketing to be able to directly attribute their sales and revenue contribution.

This comes with both
GOOD and BAD news.

The GOOD News

Marketing now has a vital role in many organizations and has been granted a seat at the big table, helping companies set strategic direction.

The BAD News

Proving the full impact marketing has on revenue is difficult – especially for lead-based businesses.

> **80%** of marketers struggle with being able to properly demonstrate the business effectiveness of their marketing spending, campaigns, and activities to their Top Management. *

The Lead-Based
Business Dilemma

While many marketers in lead-based businesses can measure the "conversions" or "leads" their activities create, there is often a big disconnect in measuring the opportunities and revenue those leads ultimately turn into. And sadly, there are very few "effective measurement best practice" resources or models to follow for lead-based marketers.

Without this critical insight, many marketers in lead-based businesses spend all of their time executing marketing programs that generate more and more leads, with no real clue of which leads are in fact turning into sales...and which ones may be junk.

If revenue doesn't perfectly sync with the investment made in marketing, marketers are forced to answer some difficult questions – ones they may not be equipped to answer.

We felt compelled to write this guide to share some of the practical steps we, as an agency that primarily works with lead based businesses, have found are effective in helping our clients truly measure the revenue impact of their lead generation activities. And once this insight is available, we outline the steps that we've found are essential to building a sustainable demand generation system that consistently and reliably produces breakthrough results.

We strongly follow the principle that "If you can't measure it, you can't improve it", which is why we always start there. Once the measurement problem has been solved, a whole world of possibilities open up to execute more sophisticated marketing programs.

Marketing Measurement Challenges
for Lead-Based Businesses

Marketers in Lead-Based businesses face a special set of challenges that are unlike their counterparts in eCommerce, Consumer Packaged Goods or Brick and Mortar businesses. Most eCommerce businesses have revenue data readily available with clear attribution using Google Analytics or another standard web analytics platform. And, CPG and Brick and Mortar businesses have very little expectation of directly attributing the revenue impact of their marketing because the sales happen so far away from the digital interaction. Lead-based businesses are stuck in the middle of these two worlds.

Platform Challenges

While most marketers can measure the number of new "leads" generated in a web analytics platform (often Google Analytics), the sale happens in an entirely separate CRM platform (usually Salesforce), which is not connected to the web analytics platform. Most companies connect their CRM to a Marketing Automation Platform like Eloqua or Marketo, which sits between the website and the CRM and is ultimately responsible for gathering the lead information from the website. Integrating these platforms for measuring proper lead sourcing and sales progression can be very challenging, often causing lead-based marketers significant frustration.

Sales Team & Sales Cycle Challenges

Lead-based businesses must rely on a sales team to turn their leads into revenue. This necessitates that the CRM platform be set up to properly measure each lead's progression through key sales process milestones so that the marketing team can measure the success of their activities. This issue is compounded with the reality that most lead-based businesses have a long sales cycle. These facts illustrate why it requires a lot of technology and human systems working in unison to effectively track leads as they progress to sale.

Attribution Challenges

Even if all your technology platforms are working together to collect source data for every new lead and you are able to see how leads are moving through the sales process, it is still difficult to determine which tactic should actually get credit for a sale. There are multiple marketing activities happening simultaneously that influence a prospect before they buy. Which one do you give credit to, and how do you effectively report on it? Salesforce's Campaign tracking does not effectively measure many modern digital media activities, either because they require much greater tracking detail than is feasible with manually created campaigns, or because they don't fit neatly into a finite Salesforce Campaign timeframes.

Common Symptoms
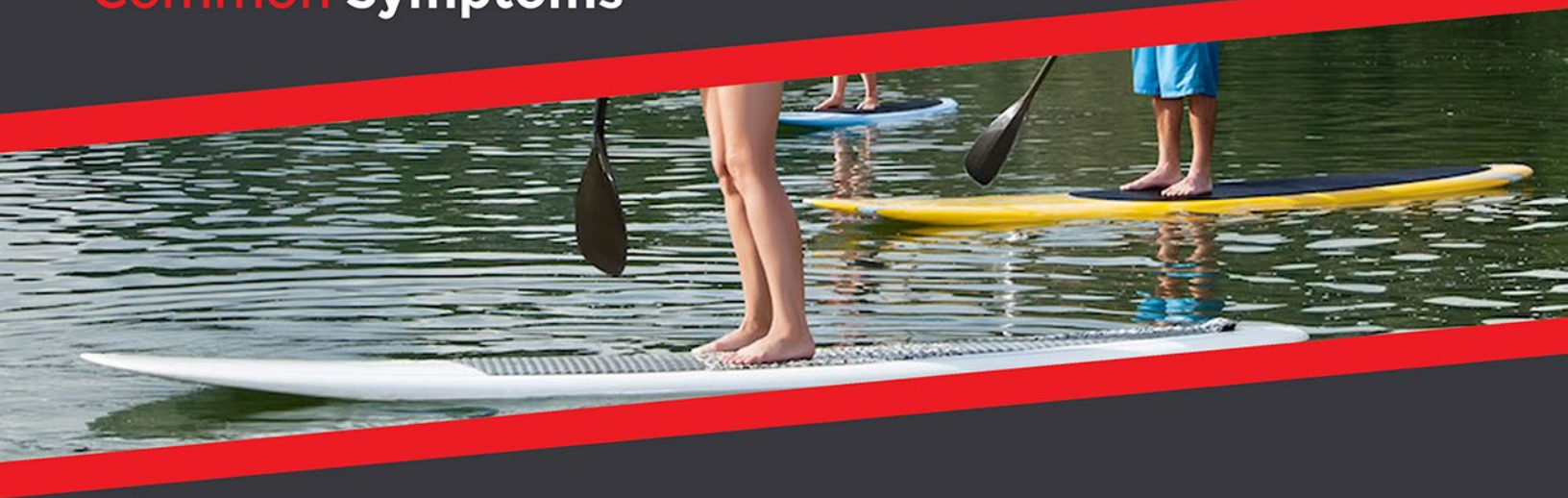
Here are a few common symptoms of these challenges:

In our experience, most lead-based businesses suffer from many of these symptoms. This has caused most marketers (and the agencies they work with) to focus on generating as many leads as possible for as cheaply as possible, and hoping for the best when it comes to the success of the business. We call this Lead Generation.

🚫 **An inability to clearly demonstrate the impact that marketing has on the success of the business**

This leaves the marketing team and its leadership at risk

🚫 **Very little quality control of leads**

This often puts sales and marketing at odds – sales complains that marketing gives them unqualified leads, and marketing complains that sales doesn't follow up with marketing-sourced leads in a timely fashion. Neither knows what to do to fix the issue.

🚫 **Setting goals and budgets is mostly a guessing game**

Not all leads are created equal, if you don't know the conversion rate of each source to opportunity and ultimately sale, it's impossible to accurately predict how many leads you need and how much they will cost to effectively hit your goals.

🚫 **No visibility into which specific marketing activities are effectively generating revenue and which ones aren't**

Optimizing your marketing activities becomes a game of darts with a blindfold on

There are solutions to these problems that open up an entirely new way to think about driving revenue from your marketing activities.
We call this **Demand Generation.**

Lead Generation vs. Demand Generation

Lead Generation Defined

As stated, we define Lead Generation as the practice of focusing marketing investment on generating as many new leads as possible for as little cost as possible. The Key Performance Indicator (KPI) is cost-per-lead (CPL). In this scenario, the marketing team's job often stops at the creation of the lead. It is not known whether sales qualifies the lead or closes it to sale. At best, marketing might get some anecdotal feedback like "those new leads you sent seem to be good".

There are actually incredibly sophisticated practitioners of Lead Generation, many of whom have mastered automated media optimization platforms, incorporated A/B and multi-variant testing throughout their landing pages, and have developed dynamic creatives that are personalized to each prospect. While each of these practices can be effective, the underlying problem is that they are optimizing towards a flawed KPI – cost-per-lead.

An Extreme Example:

We took over a client's paid media program that was being aggressively optimized towards cost-per-lead. We found that one particular keyword in the paid search program was generating over 80% of their leads. The keyword had a low cost-per-lead, and the company had invested heavily in getting as many leads as possible from it. However, upon closer examination we found that due to a small mistake in keyword match-type (using broad instead of phrase or exact) and a very high bid, they were generating 98% of their clicks on totally unrelated terms. The terms generating clicks were for a consumer version of the product.

The clicks were going to a generic landing page promoting a free trial. The visitors were confused and were filling out the form for the free trial even though it was for an enterprise class product. Once we looked into Salesforce we realized that not a single one of the leads that came from the keyword had ever turned into a sale.

Demand Generation **Defined**

We define demand generation as the practice of executing holistic marketing programs that engage all target audiences to activate them into and nurture them through the sales process, with all activities measured and optimized on their ability to generate revenue.

Demand Generation **Characteristics:**

✅ **All marketing constituencies are included in planning and execution**

Lead Generation is focused exclusively on capturing new leads. Demand Generation includes capturing new leads, nurturing leads through the sales process, reactivating dormant/inactive leads and cross-selling/upselling existing customers.

✅ **Optimizations are made based on what will grow revenue, not just what will deliver the highest number of leads**

All inbound marketing, outbound marketing, landing pages, and creative executions are measured and optimized based on their performance generating qualified leads (or reactivations) that turn into opportunities and sales.

✅ **Goals are set at the source level with clear projections of their ROI**

History-based performance models inform the investment decisions for which tactics will generate the greatest return.

✅ **Marketing and sales become aligned around a common purpose of generating more revenue**

Lead quality and sales performance are monitored to ensure that lead quality stays high, that sales follows up on marketing leads and provides the feedback necessary for marketing to keep improving.

The key benefits of developing a smart Demand Generation system are:

01 The ability to confidently set performance goals and make budget requests based on data

02 Holistic campaigns that drive engagement from all marketing constituencies

03 Clear visibility into the revenue impact of your marketing activities with granular detail that allows you to optimize both across tactics as well as within a specific property

04 Clear alignment between sales and marketing

05 The tools and visibility to continually refine programs and improve performance against the KPI that really matters - **REVENUE**

Implementing
a Demand Generation System

In helping companies transition to a Demand Generation approach to marketing, we've found that most organizations need to go through five discreet steps. Finding a partner who specializes in this type of planning is often helpful, but we will do our best to outline the steps that we use so that you can build a Demand Generation system on your own if you prefer.

1

Install a closed-loop measurement system

2

Create sales / revenue-based business models

3

Define all marketing audiences

4

Develop a comprehensive communication strategy for each audience

5

Continually report on, analyze and optimize the system

So without further ado, let's jump into each of these!

Install a Closed-Loop Measurement System

As you have noticed, measurement is the foundation of Demand Generation. The approach we advocate is to build a system that enables marketers to measure detailed original source information for every lead that enters the sales process. It also includes setting up Salesforce in a way that allows marketers to get real-time feedback on every lead's progression through the sales funnel from lead qualification to opportunity and ultimately to close. This type of system requires several platforms and processes to work in unison.

Before we jump into the details, a couple of quick notes:

While Salesforce Campaigns are helpful in some forms of marketing measurement, we've found that they have some major limitations in accurate attribution and they require a significant amount of set up and upkeep. For these reasons, we'll be outlining a different approach to measurement within Salesforce that we feel is more accurate for proper source attribution and is much simpler to maintain.

We've developed our own proprietary software tool that we use to collect accurate source information for our clients. While most marketing automation platforms have some built-in functionality that is similar to our tool, we felt that each had big enough holes that it warranted creating our own. There are also other tools on the market that purport to do some of the same things we outline below. We cannot vouch for their efficacy but they may be worth considering.

Collecting **Source Information for Leads**

The most straightforward way to capture detailed source information on your website is to have your web forms do double duty. First, the form captures the lead's personal information (e.g., Name, Email Address, Phone Number). Second, we recommend adding hidden fields and form processing logic in order to pull through source and conversion information.

The types of information that should post through forms fall into two buckets:

Detailed source information:

This is information about how each visitor got to the website. This information is unique to every visitor and should automatically be populated into hidden fields (more details on this in a minute).

"Conversion Type" information:

This information records what type of form the visitor submitted (e.g., Contact-Us, Whitepaper, Free Trial). This information is related to the specific form that was filled out and will be the same for everyone who submits a given form. We recommend using a naming convention like "Conversion Type – Asset Name" (e.g., Whitepaper – 2016 Trends). This value can be "hard-coded" directly in the hidden field on the website, updated via JavaScript, or applied in the post-submission form processing if the form isn't shared by multiple assets.

The mechanics of capturing the source information for every lead, and populating that information into the hidden fields in your forms is different for every marketing automation platform and form handler. We recommend reading the documentation for your particular form handling solution on how to best configure this part.

As we mentioned, none of the marketing automation platforms have built-in features that allow the full flexibility we recommend. Particularly, they don't all allow "first-click attribution" (where the first source that drove a visitor to the website in a 30-day window gets the credit for generating the lead). Some also only pull in the tracking information if the visitor never leaves the landing page. Once the user clicks to any other page of the website, the tracking gets lost. For these reasons, we built our own tool that has much more flexibility in how it tracks data and how it assigns attribution.

We do license the tool for other companies usage, if you are interested please contact us (our contact info is at the end of the guide).

Where **Does the Detailed Source Information Come From?**

We recommend setting up your hidden fields to capture the standard Google Analytics "UTM parameters" on your URLs, which should contain detailed source for every visitor to your website. You may already be doing this to fuel your Google Analytics tracking. By using the Google Analytics parameters of **UTM_Medium, UTM_Source, UTM_Campaign, UTM_Content and UTM_Term**, you can get up to five levels of detail on every visitor. Google has some great instructions on how to use each of these parameters. If you are unfamiliar, you add these "parameters" to the end of every URL to your website that you can control (like all paid media and social media links) so that Google Analytics (and your hidden fields) can measure how every visitor gets to your site.

In instances where leads are generated from activities unrelated to your web forms (like Tradeshows or List Purchases), it is a best practice to set a value in the same UTM parameters upon list upload. Even sales sourced or channel referred leads should have as much detailed source information as is possible. This will give you valuable data on how all leads progress through the sales system, and will provide you with the input that you need in order to fully model out marketing as well as the entire business.

Passing Information **Between Systems**

Like all of the visible fields (Name, Email and Phone Number), the hidden fields should pass values from your marketing automation platform to Salesforce upon lead creation. We recommend setting up the fields in Salesforce in such a way that the values are "frozen" upon lead creation. To that end, our typical install will include fields for both "Original" UTM parameters and "Most Recent". This allows us to add additional logic to recognize and attribute the new "source" of leads who reengage after falling out of the sales process.

Once the data is in Salesforce, it's also helpful to sync these fields between the Lead Object and the Contact and Opportunity Objects, so that standard Salesforce reports can include the originating source and Conversion Type values, regardless of the way in which you pull the report.

Once the source and conversion information is attached to every lead record, next make sure the Salesforce fields used to track progression through the sales process are set up effectively.

Lead Qualification **Monitoring**

The Lead Record in Salesforce is designed to be used for the lead qualification process. Regardless of what terminology your organization uses, there should be a way to measure if the leads you generate are ultimately qualified, meaning that they are the right type of person. We recommend using the standard Salesforce Lead Status field to measure this process. It is a simple drop-down that the sales team can use to document where they are in the qualification process for each lead. Marketing is able to gauge lead quality by measuring the progression of marketing generated leads through the values in this field.

Example **Lead Status Values**

OPEN	**WORKING**	**JUNK INFO ***
The initial status before a lead is worked by sales	Once the salesperson starts trying to qualify the lead	If the lead provided bad name or contact information in the form
DISQUALIFIED *	**QUALIFIED – NO OPPORTUNITY ***	**QUALIFIED/CONVERTED ***
Not the right type of lead	If a lead is the right type of person, but is not yet ready to buy	If a lead is the right type of person, and they are a potential buyer

The asterisks (*) represent lead statuses that are final. Obviously additional lead statuses may be added to fit your business, but these are minimum values that we believe every organization should keep track of to help inform marketing on their ability to generate qualified leads.

Opportunity Stage **Management**

Once a lead has been converted into an opportunity, we recommend using the **opportunity Stage field** along with an **opportunity Amount field** to measure the remainder of the sales process. Opportunity Stage should be used to measure the sales milestones your team uses as they work a deal to Closed Won. Setting an Amount value on every opportunity allows the marketing team to measure Pipeline they are helping to source for the sales team. This is especially helpful in long sales-cycle businesses where the deal may not close for weeks or months.

One important note: in order for the detailed source information to transfer from the lead to the opportunity, *the opportunity must be created upon lead conversion*. If your sales team converts leads to contacts without opportunities, then later creates opportunities from those contacts, the tracking will not pass to the opportunity. This is a limitation in how Salesforce works out of the box.

Step One **Summary**

Attaching detailed source information to every lead, and working with the sales team to ensure consistent usage of Lead Status, opportunity Stage, and opportunity Amount, will allow the marketing team to truly know the performance of every lead they generate.

Create Sales / Revenue-based Business Models

Understanding the composition of how your business currently generates sales with as much detail as possible is incredibly valuable as you transition to a Demand Generation approach to marketing. Even with incomplete data, the insight you'll gain into what marketing is ultimately responsible for delivering will give you much needed clarity when setting goals and defending budget requests. The modeling exercise we advocate includes defining the contribution of all customer types (e.g., New Customer, Existing Customer, Renewal), and factoring in each of the revenue sources of these customers (e.g., Marketing, Sales, and Channel).

Historical **Analysis**

Using whatever Lead Source and Customer Type data that currently exists in your system will serve as the starting point for the business modeling exercise. It is ideal to run multiple report types out of Salesforce to begin building this historical perspective of performance.

Some common reports that will help you during this exercise:

Lead With Converted Lead Information Report

When set up correctly, this report includes detailed source information for every lead, and shows how many have turned into opportunities and sales.

Opportunity Report

Not all opportunities will come from converted leads. Most existing customer sales, renewals and some sales-sourced deals will never be entered as a new lead and will therefore not show up in the lead-based reports. This report will help you build a complete view of all opportunities and sales in a given month or quarter.

Revenue Source Analysis

When grouping data from this analysis, we recommend first grouping by major revenue source bucket. The buckets we have found to be useful are Marketing, Sales, Channel, Upsell/Cross-Sell and Renewal. These may vary based on your business.

We typically perform two types of analysis on these buckets. First, we use trended views of the revenue generated from each source over the previous 12-18 months. This helps to identify normal seasonality trends, and may show a standard growth or attrition rate that can be used for projecting future performance. In addition to trended views, we also build a 12-18 month waterfall view of each revenue source to understand the differences in how each source progresses through the sales process. These differences typically include the Lead-to-Opp rate, Avg. Opportunity Revenue, Close Rate, and Avg. Revenue per Sale.

Source	Leads	Opp %	Opps	Opp Rev	Close Rate	Wins	AOV	Revenue	% of Rev
Marketing	3,635	7.00%	254	$5,581,106	28.6%	73	$21,934	$1,596,196	40%
Sales	N/A	--	112	$2,941,136	23.3%	26	$26,260	$685,285	17%
Channel	N/A	--	35	$1,015,894	13.8%	5	$26,026	$140,193	4%
Up/Cross-Sell	N/A	--	108	$1,179,412	49.4%	53	$10,969	$585,208	15%
Renewal	N/A	--	710	$1,425,857	70.0%	497	$2,007	$998,100	25%
TOTALS	3,635	--	1,220	$12,143,405	53.6%	654	$6,121	$4,004,982	100%

From this analysis we begin to understand what marketing has historically contributed to overall revenue.

Marketing Source Analysis

Once the top level revenue sources have been modeled, we recommend performing the same exercise at a detailed level just for marketing. When doing the marketing specific analysis we separate out the lead sources into two distinct groupings: foundational and leverageable.

Foundational **Sources**

These are lead sources that can be counted on to deliver leads without a direct connection to the outbound marketing activities you do. These traffic sources often include direct type-in traffic, organic search and referral traffic. If you look back in history you'll likely see that these sources have trended together in one direction or another, and don't vary wildly as marketing campaigns are run.

VS

Leverageable **Sources**

These are the lead sources that are directly impacted by the marketing activities you are running. These often include paid media, tradeshows, PR or social media programs. These sources should deliver leads when activities are running, and will likely fall-off dramatically or stop all together when campaigns end. Leads from these sources are the primary ones you can impact with marketing investment.

Using Foundational **vs.** Leverageable Sources **to Model Future Growth**

Having a clear understanding of the percent of leads, and the waterfall performance of your leverageable sources is critical when setting realistic goals and budgets. Companies often collapse the performance of foundational and leverageable sources and assume that they will go up or down proportionally to the marketing budget. This can be a very costly mistake because it leads them to make incorrect assumptions about future growth.

An Example **to Illustrate this Point:**

If a company's leverageable sources are responsible for 40% of marketing sourced revenue on a quarterly basis, then it would take a 50% increase in marketing budget to generate 20% topline marketing growth (since the foundational volume would likely stay the same or only show modest growth). If this company incorrectly assumed that to grow 20%, they only needed to invest 20% more in marketing, everyone would be sorely disappointed with the likely 8% topline growth rate, even though it is exactly what one would expect to happen when the data is viewed properly.

SUMMARY

Use historical analysis to understand both what percentage of total revenue is sourced by marketing, as well as how the marketing contribution is divided between foundational and leverageable sources. Then you will be able to set realistic goals, develop informed budgets, and have confidence that you can **reach your growth targets.**
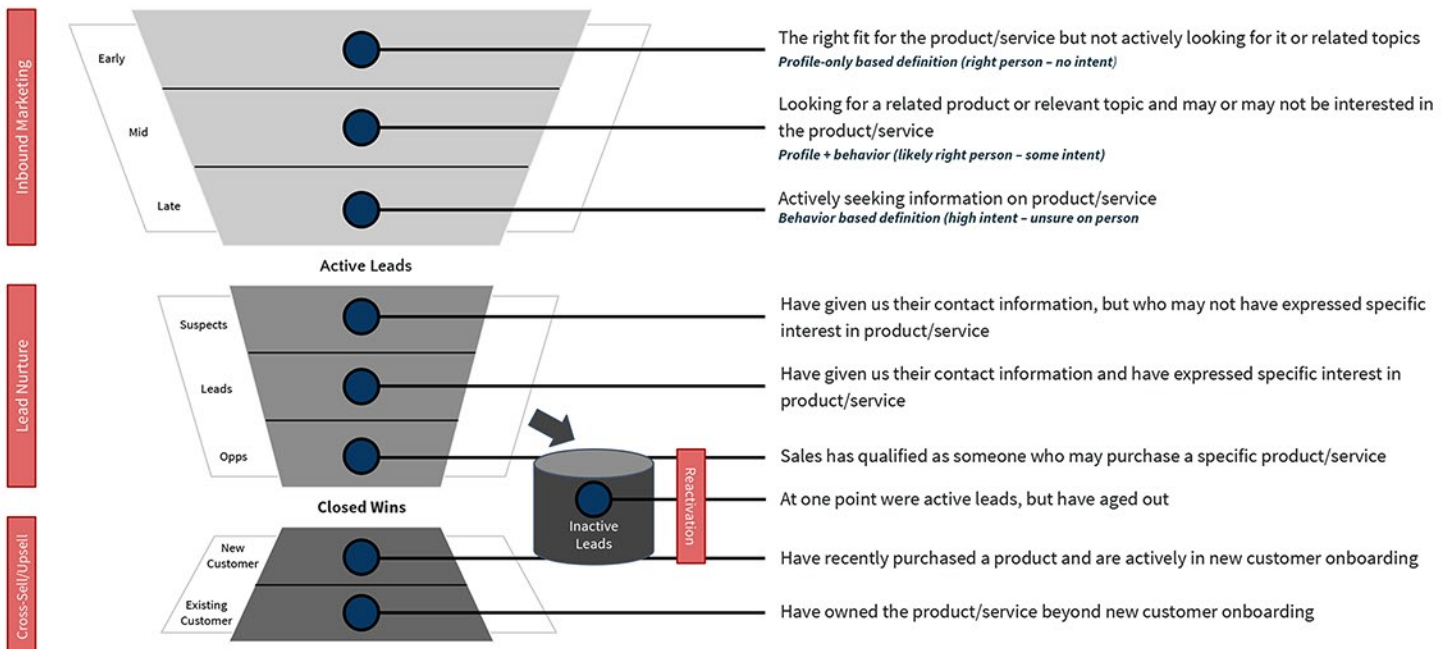
Define All of Your Marketing Audiences

While steps one and two are focused on building a solid foundation of measurement and analysis, step three is when you begin the development of new marketing programs. As all good marketers know, you start any marketing planning by clearly defining your target audiences.

If you are focused on purely lead generation, it's likely that you are only using a narrow definition of your marketing audience. When developing a comprehensive Demand Generation system, **we recommend thinking beyond just one audience.**

In defining target audiences for Demand Generation, it is critical to consider your audiences across two dimensions: their profile (their demographic or psychographic info) and their consideration stage. While profile-based audience definition is valuable, if you don't understand where they are in the consideration/buying process, you will likely not deliver an optimal experience to them. In lead-based businesses, your job shouldn't be done once you've generated a new lead. You should find ways to help nurture leads through the sales process and mine your inactive leads and customers for potential opportunities.
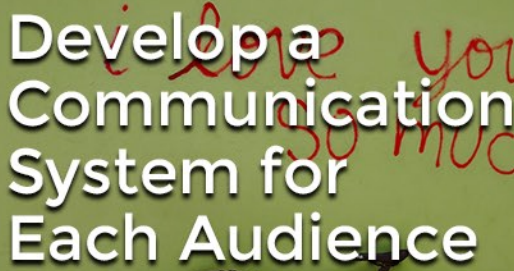
Here's the funnel we've developed to depict the consideration stages for lead-based businesses that we use as a starting point for defining target audiences.

Stage	Description
Inbound Marketing — Early	The right fit for the product/service but not actively looking for it or related topics. *Profile-only based definition (right person – no intent)*
Inbound Marketing — Mid	Looking for a related product or relevant topic and may or may not be interested in the product/service. *Profile + behavior (likely right person – some intent)*
Inbound Marketing — Late	Actively seeking information on product/service. *Behavior based definition (high intent – unsure on person)*
Active Leads — Suspects	Have given us their contact information, but who may not have expressed specific interest in product/service
Lead Nurture — Leads	Have given us their contact information and have expressed specific interest in product/service
Lead Nurture — Opps	Sales has qualified as someone who may purchase a specific product/service
Inactive Leads / Reactivation	At one point were active leads, but have aged out
Cross-Sell/Upsell — New Customer	Have recently purchased a product and are actively in new customer onboarding
Cross-Sell/Upsell — Existing Customer	Have owned the product/service beyond new customer onboarding

Layering profile (or behavioral) data on top of these consideration segments will help you build a much richer perspective of your target audiences. With this new perspective, you'll be able to design Demand Generation programs optimized to solve their unique needs.

Develop a Communication System for Each Audience

With a clear definition of each of your target audiences, you will be ready to develop a comprehensive communication touchpoint system for each audience. This is the stage where you actually build your campaigns to connect with and convert your audiences.

Areas to Plan as Part of **Your Communication System:**

Media Touchpoint Planning

This includes defining which media touchpoints will most effectively engage your target audiences along the path to your objectives. Selecting media vehicles that are most effective based on the profile or behavioral definitions you are using for your target audience, and where the audience is in the consideration process, will ensure optimal performance. This spans all paid, owned and earned media activities.

Creative Messaging Planning

This includes defining the overarching concept of the campaign, and versioning the creative ad units to align with each of the target audience segments. The content strategy and calls-to-action should also be defined in this phase of planning so that the ad unit and web destination have a seamless experience for the user.
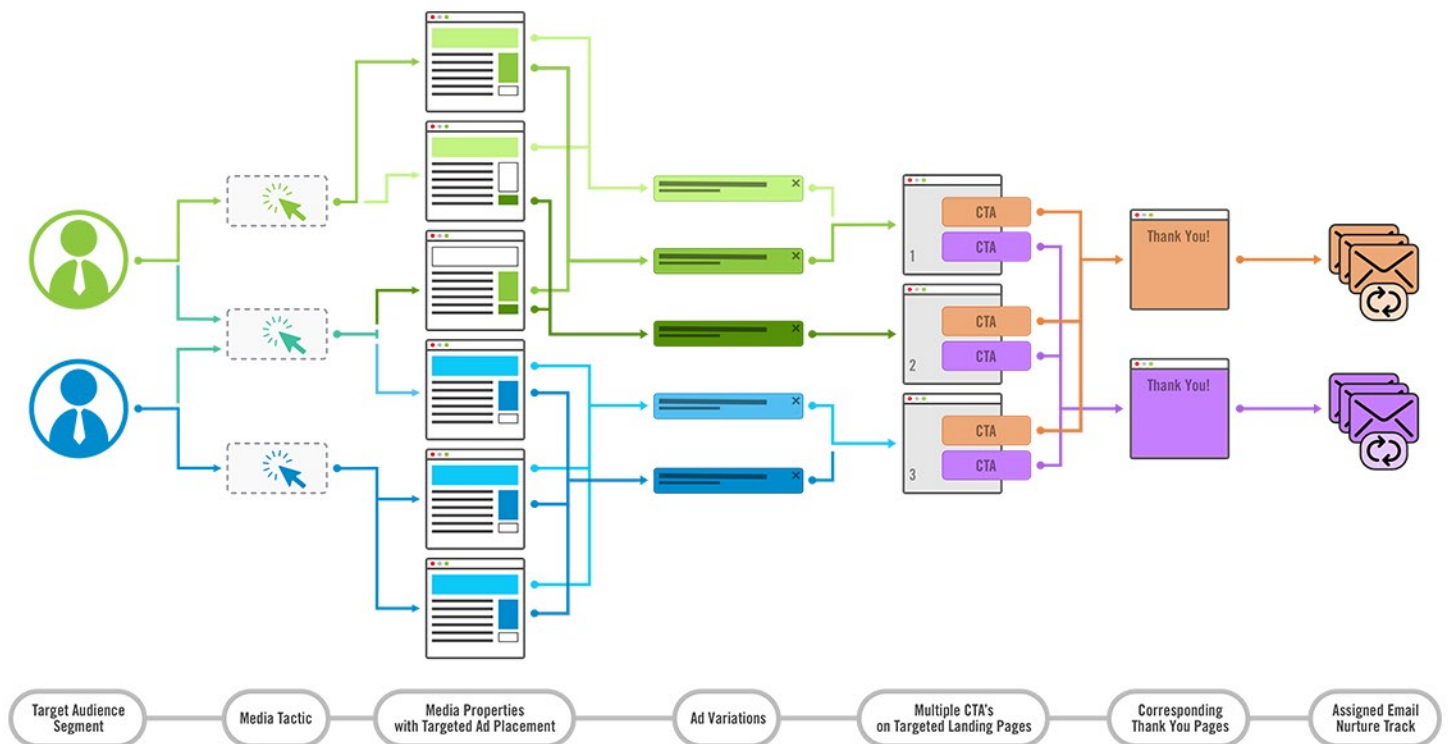
Web Destination Planning

This includes defining where you will send the audience on your website in order to get them to engage and convert. This may mean sending them to a dedicated landing page or to an existing page of your website. These destinations should be coordinated with the ad units from the creative messaging planning for cohesion, and should be optimized to engage and convert the audience using landing page best practices. The design, content strategy and calls-to-action need to be planned out for each audience segment to ensure an optimal user experience.

Nurture Planning

This includes the thank-you page, nurture emails and retargeting that follow after a conversion on the website. The nurture activities should feel like a natural extension of the web conversion experience the user just completed. The program should be personalized to each audience based on the type of conversion they have completed, and is intended to help provide the information the lead needs to progress further through the sales process.

As you design marketing communication plans we recommend the use of system diagrams, like the one shown below. This ensures that you think through each touchpoint for each audience.

| Target Audience Segment | Media Tactic | Media Properties with Targeted Ad Placement | Ad Variations | Multiple CTA's on Targeted Landing Pages | Corresponding Thank You Pages | Assigned Email Nurture Track |

Planning and executing across all of these touchpoints ensures that each audience segment gets an optimal experience, designed to help move them closer to purchase.

Report On, Analyze and Optimize the System

Once communication systems are launched, the biggest determinant of success or failure is the ongoing measurement and optimization of the activities. No matter how much planning and preparation you do prior to launch, once the campaigns are in market there will always be room for improvement. Correctly reporting on, analyzing and optimizing the system is essential for success.

We use many reports and chart types to measure success and to identify opportunities for improvement. All of these different reports and charts typically fall into three types.

Goal Performance Charts

Goal performance charts are set up to measure the performance of your activities based on the projections you defined in the modeling process. We use multiple levels of data to view these charts, starting at the highest level which is typically Revenue Source (e.g., Sales, Marketing, Channel, and Cross-sell/Upsell). Then we will drill down into specific goal performance for each marketing channel (e.g., Foundational Traffic, Paid Media, and Social Media). You can even go down to goal performance by property. Depending on what your KPIs are, you may end up with goal performance views for each of them, including qualified leads generated, opportunities generated, and total sales generated. These charts should give you and the executive team a quick view of how your entire sales system, and marketing specifically, are doing at hitting the targets outlined for the month or quarter.
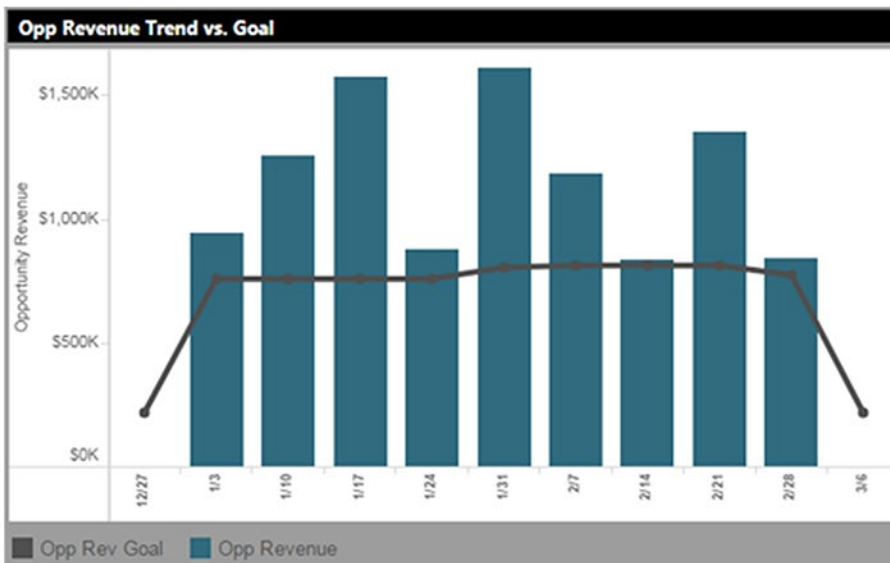
Opportunity Revenue Performance QTD				
Medium for Reporting	Opps	Opp Revenue	Opp Rev Goal	Opp % Achieved
Organic/Direct	167	$1,959,378	$2,525,021	78%
Inbound Phone/Chat	57	$1,740,099	$757,506	230%
Tradeshow	24	$1,265,958	$471,337	269%
Paid Search	15	$272,233	$247,873	110%
Paid Social	4	$85,945	$84,168	102%
Ded. Email			$65,650	0%
Content Syndication	3	$45,246	$63,967	71%
Organic Social			$50,500	0%
Display	1	$3,000	$37,202	8%
Analysts	2	$200,000	$0	
List Import	7	$186,367	$0	
Tech Partners	2	$10,000	$0	
Grand Total	282	$5,768,226	$4,303,225	134%

Example
Goal Performance

Trended Performance Charts

Trended performance charts are primarily used to measure fluctuations in performance over time for any specific KPI. These charts can have a goal line overlaid on them to see how well you are hitting the total goal for that KPI on a weekly, monthly or quarterly basis. The benefit of this type of chart is it shows relative performance over time, so you can see if you are trending in the right or wrong direction. These trends help you see the impact of changes made over time, and can help you spot potential issues that need to be addressed.

Example Trended Weekly Opportunity Revenue chart with a goal line

Performance Waterfall Charts

Performance waterfall charts allow for deep dive analysis that can be used to identify the progression of a given source's clicks and leads through the sales process. A "source" in this case can be a top-level view of marketing vs. sales, or it can drill down into the Medium, Source (Property), Campaign, Content or Term (based on the UTM parameters passed to leads from your URLs, as described earlier). With this view, you can compare and contrast the performance of various sources to your KPIs, and also see the underlying steps in the process that may be generating the success or causing a potential failure point.

Analyzing and using this data gives you the insight you need to make specific optimizations to the campaign in order to improve performance. If the "Conversion Rate" of clicks-to-conversions is too low, then there are optimizations to be made to the landing page. If the Lead-to-Opp rate is low, you may need to change the lead nurture program to better support the sales process for those leads. Mining this data will give you the insights you need to tweak the entire marketing and communication system to find optimal success.

Paid Search Campaign Performance

Clean Campaign	Cost	Clicks	Cost/Per	Conv. Rate	Conv.	Cost/ Conv.	Total Leads	Cost/ Lead	Lead-to-Opp Rate	Opps	Opp Revenue
Campaign #1	$23,231	6,911	$3.36	3.82%	264	$88	124	$187	16.1%	20	$179,650
Campaign #2	$11,458	1,618	$7.08	3.46%	56	$205	36	$318	5.6%	2	$3,025
Campaign #3	$8,493	1,077	$7.89	2.79%	30	$283	9	$944	22.2%	2	$7,514
Campaign #4	$7,886	579	$13.62	3.28%	19	$415	2	$3,943	0.0%	0	$0
Campaign #5	$7,027	7,178	$0.98	1.71%	123	$57	38	$185	2.6%	1	$90,000
Campaign #6	$6,786	545	$12.45	3.67%	20	$339	7	$969	0.0%	0	$0
Campaign #7	$5,789	247	$23.44	1.21%	3	$1,930	3	$1,930	33.3%	1	$22,708
Campaign #8	$5,542	374	$14.82	1.60%	6	$924	7	$792	0.0%	0	$0
Campaign #9	$4,030	467	$8.63	1.50%	7	$576	3	$1,343	33.3%	1	$5,000
Campaign #10	$3,298	449	$7.35	2.45%	11	$300	6	$550	0.0%	0	$0
Campaign #11	$1,065	72	$14.79	1.39%	1	$1,065	1	$1,065	0.0%	0	$0
Campaign #12	$1,027	118	$8.71	6.78%	8	$128	0				
Grand Total	$85,633	19,635	$4.36	2.79%	548	$156	240	$357	11.3%	27	$307,897

Example of a drilled down Paid Search Campaign waterfall performance chart that compares the relative performance of each campaign against a host of metrics

Using multiple versions of these report types, you should have the insights you need to design effective marketing campaigns and to continually optimize them over time.

Conclusion

Building a successful Demand Generation system requires 5 key steps:

Step 1: Install a closed-loop measurement system

Step 2: Use modeling to understand your business

Step 3: Define all of your marketing audiences

Step 4: Develop comprehensive communication systems for each audience

Step 5: Report on, analyzing and optimize the system

By leading your marketing organization through these 5 key steps, you will be well on your way to transforming your marketing activities into a high performance revenue generating engine. You'll have a clear understanding of what marketing contributes to the business, how to continue improving it, and what type of budget and resources you'll need to confidently and consistently hit your goals.

Marketers who embrace the Demand Generation approach to marketing will have a clear competitive advantage, both for their organization and for their career. This approach to marketing is in its infancy, and there is much to learn. However, there is no doubt that the expectations on marketers will only continue to build in the years to come, and marketers will need to develop the skills and processes that will allow them to succeed in this new future.

About Integrous Marketing

Integrous Marketing is a leading Demand Generation agency that specializes in lead-based businesses. We're committed to taking the practice of digital marketing to new levels of accountability and results. We have pioneered new marketing services and technology solutions that reorient all marketing activities to be judged on clearly visible business results. We work with a broad range of lead-based clients that we enjoy partnering with and who appreciate and value the impact we have on their business.

If you like what you've read and are interested in partnering with Integrous Marketing to help your organization, please contact Josiah (our President) by email at **Josiah@integrousmarketing.com** or by phone at **1-888-974-8671**.