



The Delve Group, Inc.

## **Overview of Lead Generation Processes and Case Studies**

# Why Lead Generation?

## Three Common Truths about Lead Generation for Professional Services businesses:

1. In order to avoid the revenue roller coaster that plagues many professional services businesses, **you need to generate a steady stream of leads.**
2. For most professional services, **prospective clients do not make “impulse” buys.** Buying has to make it to the top of their to-do lists for any of your sales to happen.
3. As much as you (the seller) might like to shorten the sales cycle, **buying complex, important, trust-based services takes time.** The initial lead will only happen if, when the buyer has a need that is at the top of her to-do list, and she thinks of you.

**Unfortunately for service providers, it's nearly impossible to predict *when* this elusive time of need is going to arise for the buyers.**

# Why Lead Generation?

## Seven Rules of Professional Services Lead Generation

1. Plan for Outcomes and ROI
2. Offer Value in Marketing and Selling
3. Create and Leverage Offers and Experiences
4. Use Targeted, Integrated, and Direct Marketing Tactics
5. Sustain Lead Generation and Lead Nurturing Efforts
6. Measure, Test, and Improve Your Lead Generation and Nurturing Efforts
7. Build Brand through Lead Generation

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# Why Lead Generation?

Get them interested in what you have to say!

The first step in converting potential buyers into clients is to get them interested in what you have to say. To do this you must generate them as leads. This process involves:

1. Identify buyers
2. Get them to pay attention to you
3. Seduce them with your value
4. Engage them in a meaningful and valuable discussion about how you can help them
5. Nurture them to the point where they will actually engage your services

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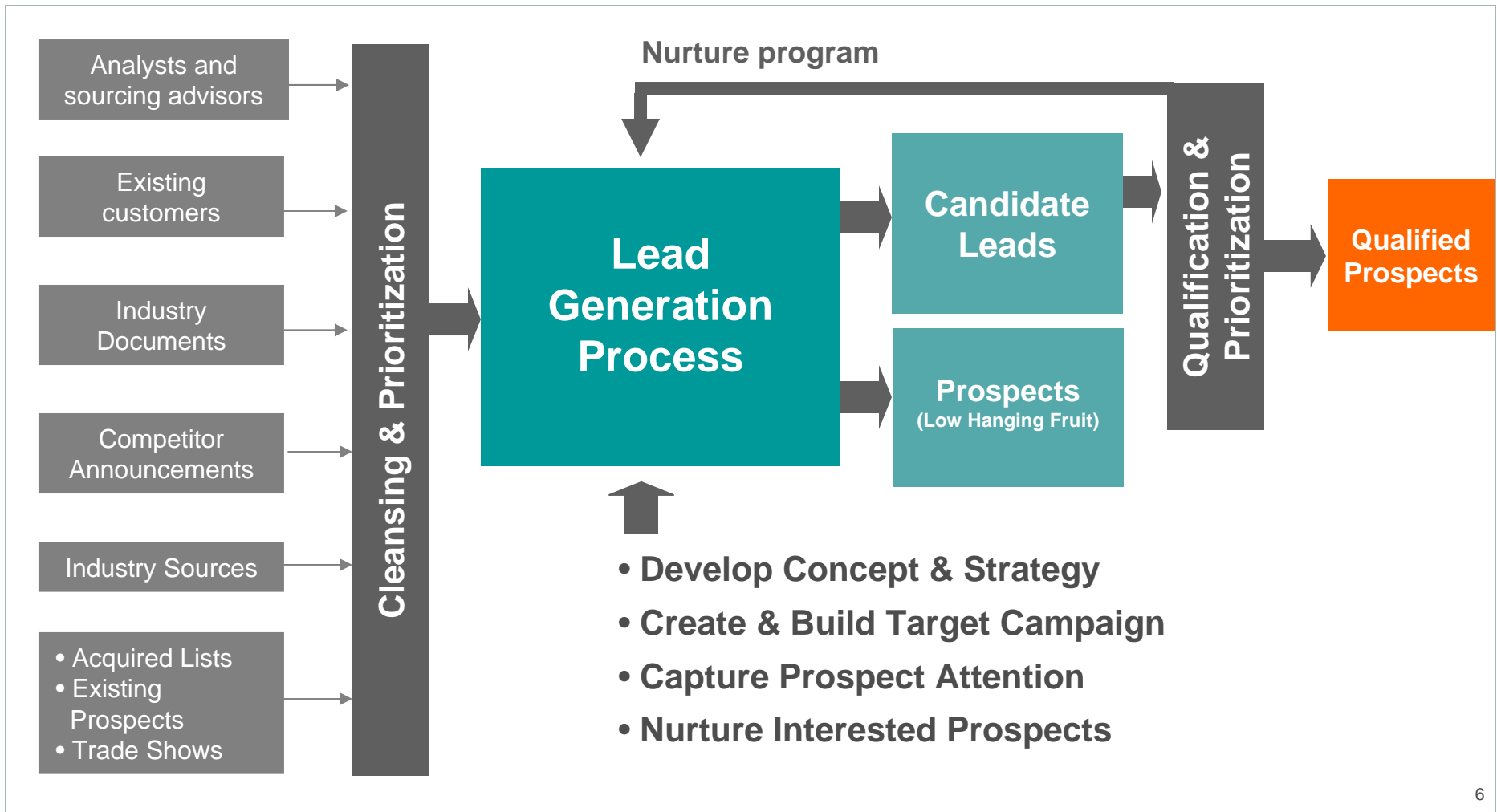
# Why Lead Generation?

## Top 10 Lead Generation Mistakes Made by Professional Services Firms

1. Spending on marketing activities that don't produce ROI
2. Holding unrealistic expectations for marketing
3. Not implementing marketing because of inefficient decision-making
4. Not being able to sustain implementation over the long-term
5. Relying on one tactic only
6. Poorly implementing specific tactics (e.g. poorly written marketing copy, poorly designed or poorly targeted campaigns)
7. Dropping leads and failing to nurture leads
8. Not communicating value in marketing
9. Not integrating various marketing tactics well
10. Planning poorly for lead generation

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# Lead Generation Model



# Return on Investment Model

(based on experience)

- Measurable ROI is driven only by lead generation. Awareness of your brand is an additional value.
- ROI model based on industry target groups of 50-100 companies with 3-5 contacts per company.
- Response rate based on multiple touches combined
- Targeted industry groups (TBD)
  - Financial Services
  - Banking
- Model needs to be populated with your specific company's data (see *italicized items*)

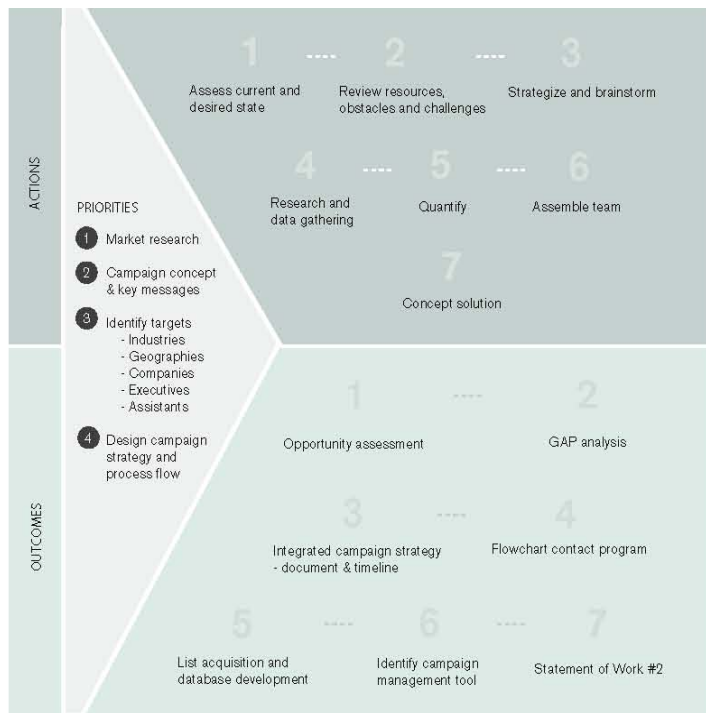
Industry Groups	Stats
No. of Companies targeted	50
No. of contacts per company	5
No. of names to be cleansed	250
% Loss in cleansing process	10%
Targeted mailing list high-impact	225
Respond to PURL & follow up mail	30%
Suspect List	67.5
Conversion to survey	60%
Prospect List	41
<hr/>	
<i>% of Meetings</i>	25%
No. of qualified meetings per group	10
<i>% of Proposals</i>	25%
No. of Proposals	3
<i>% of Deals</i>	33%
No. of Deals	1
<i>Avg Deal size range</i>	\$x,000,000
	\$xx,000,000
<i>Lifetime Value</i>	?

# Overall Process

## Phase I and II – Create Campaign

### Phase I – Think and Plan:

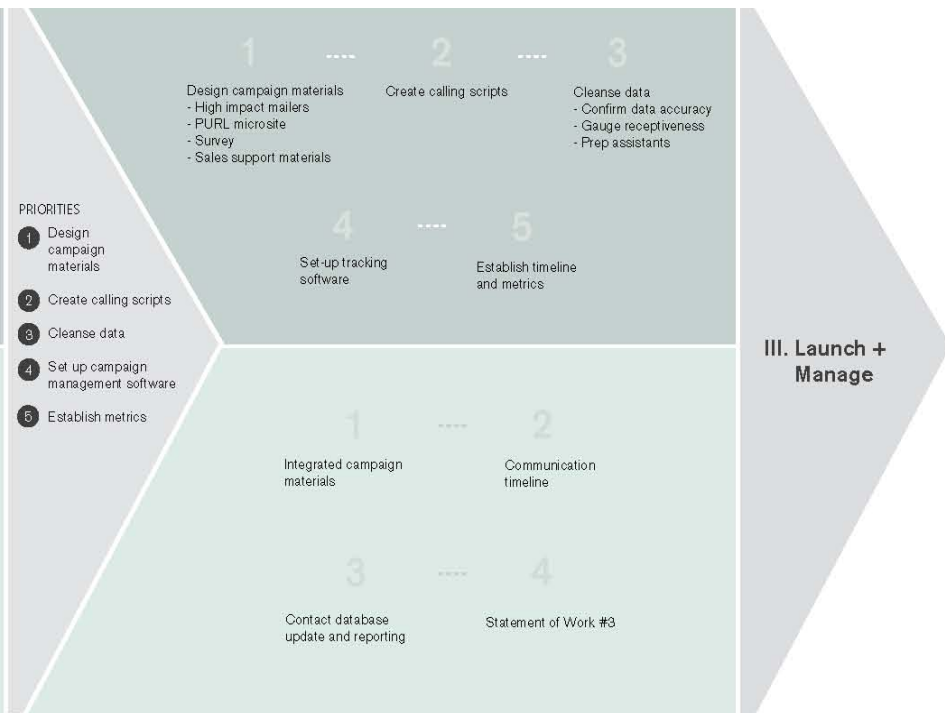
Concept and Strategy Development



**6-8 Weeks**  
(plus initial software setup)

### Phase II – Create and Build:

Targeted Campaign Execution



**6-8 Weeks**  
(repeat process for each target group)

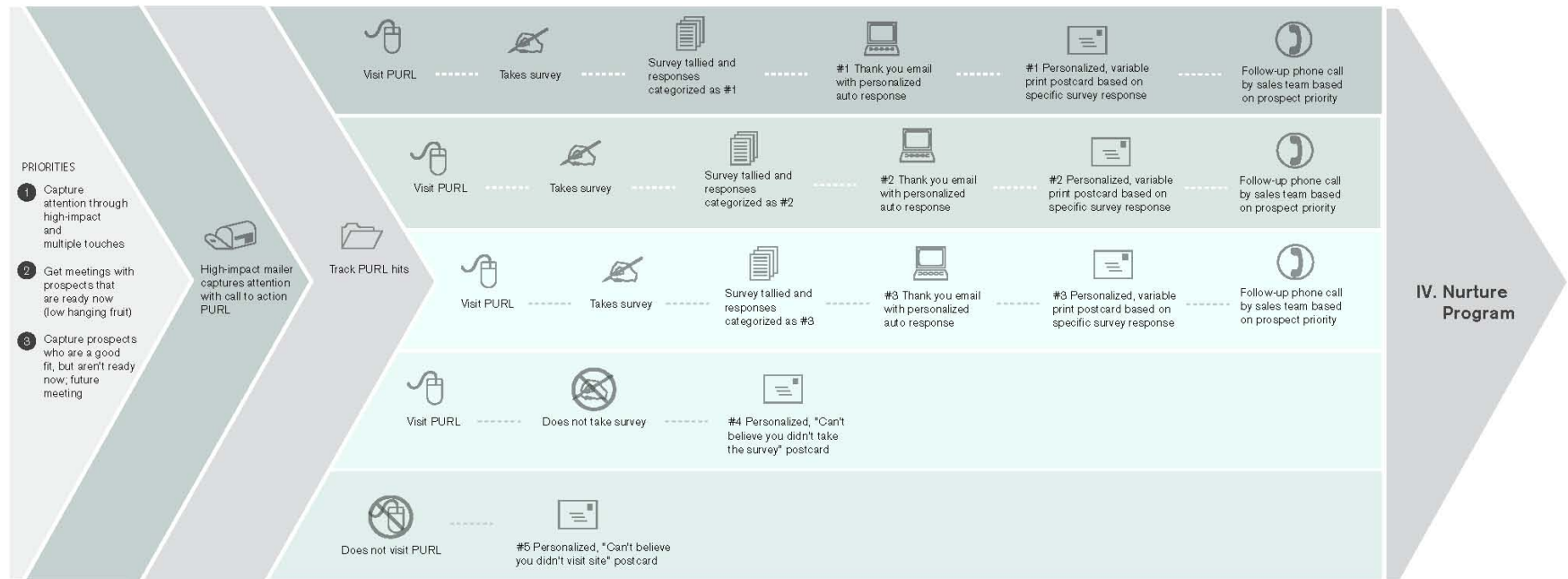
**III. Launch + Manage**

# Overall Process

## Phase III – Capture Prospect Attention

### Phase III – Launch and Manage:

#### Capture Prospects

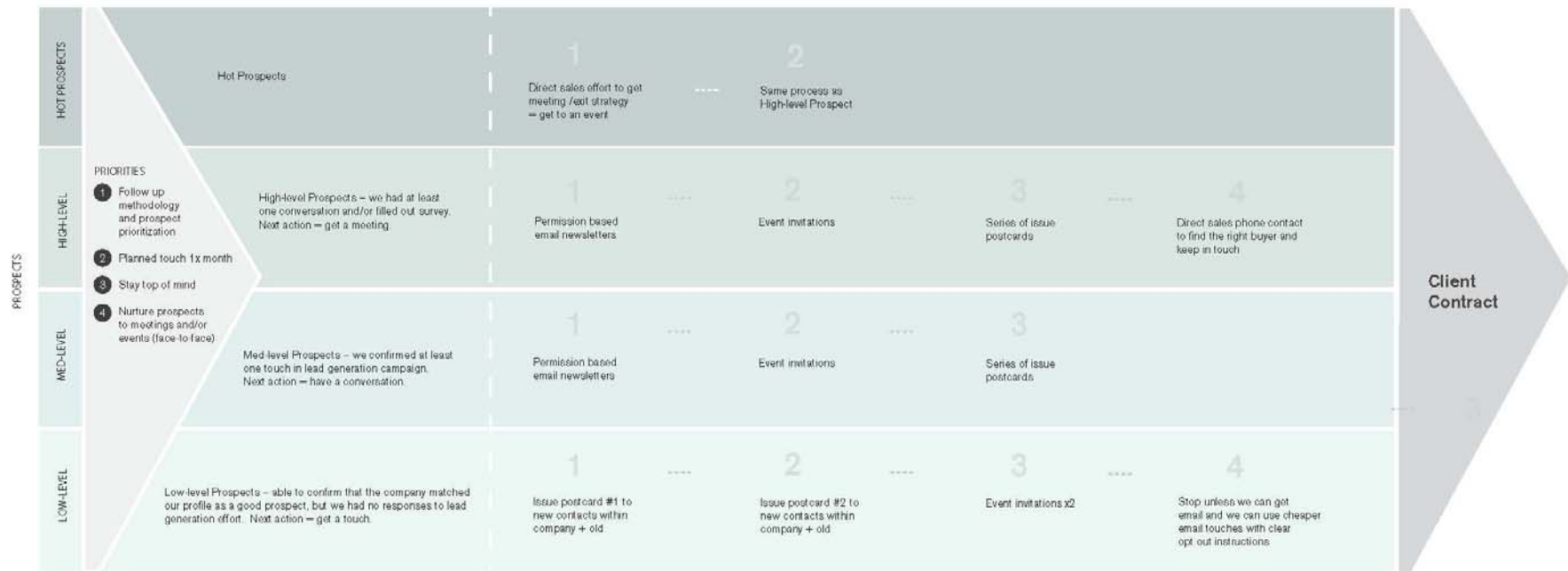


# Overall Process

## Phase IV – Nurture Prospects

### Phase IV - Nurture Program:

Drive Additional Opportunity



12 Months Cycle

# Overall Process

## Drive Stay in Touch Campaign

### Stay in Touch Campaign:

Public Relations / Speaking Events

Monthly Webinars

Symposiums for Clients & Prospects

Quarterly Seminars

Trade Advertising

Case Studies / Whitepapers / Thought Leadership

# Recommended Efforts to Begin Developing a Program

1. Assemble Team
  - Identify resources
  - Determine commitment of management time
2. Develop strategy and build agreed to Lead Generation concept model
3. Begin research activities
  - Select target industries
  - Identify customer short list
  - Begin discovery process – buy lists, review industry data, etc.
4. Assess Opportunity
  - Gap analysis
  - Review existing customer list quality
5. Establish metrics and initial time line
6. Identify required campaign materials

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# The Delve Team

## **Brenna Garratt**

Brenna has been instrumental in working with senior executives to reshape and reposition existing companies, as well as invent, position, and grow new ones. She has led multi-disciplinary teams in a wide range of assignments, including corporate strategy, branding, internal communications, name development and sales and marketing collateral programs. Brenna has applied her skills to a variety of industries – both business-to-business and business-to consumer.

## **Dan Klein**

Dan is a serial entrepreneur with deep expertise in growing businesses. His unique expertise is focused on leading ways to leverage one-to-one marketing, gorilla marketing, interactive marketing, and email marketing practices to make a material impact on the growth of his client's businesses. His skills make him adept at designing the strategy/road maps, assigning the budgets, assembling the teams, and overseeing the execution of these unique programs. Prior to joining the Delve Network, Dan's leadership positions have included CEO of a sales and marketing consulting firm specializing in helping small to mid-size, B2B technology businesses generate more revenue by outsourcing marketing and/or sales, cofounder of a St. Louis-based virtual ad agency that provided agency quality marketing services through freelancers, and Director of Interactive for a niche agency in St. Louis. Dan is on the board of several charities and associations and routinely speaks on the topics of one-to-one marketing, gorilla marketing, interactive marketing, and email marketing.

# The Delve Team

## **Ellen Sluder**

Ellen is a B2B brand strategist with The Delve Group, Inc with a focus on small and emerging enterprises. Since joining Delve, Ellen has successfully led branding projects for companies in a variety of industries including: HR Outsourcing, financial risk & regulatory compliance, executive coaching, revenue cycle management, and contact center outsourcing. In addition to corporate branding, Ellen co-led a very successful internal communications campaign for a Fortune 50 healthcare organization and has developed several product/service brand strategies.

## **Vanessa Ridder**

Vanessa is a creative director and senior designer with Delve. She has over six years of experience working with business-to-business companies to build and steward their brands, develop compelling communication tools, and ensure our clients leverage their competitive advantage by utilizing a multitude of online and offline vehicles to further their marketplace presence.

## Case Study – Panacya Software

**Client:** A middleware web performance monitoring software company in MD.

**Purpose of Campaign:** Generate new sales leads and drive attendance at a trade show.

**Target:** IT Directors of Fortune 500 companies within financial services (target audience approximately 500)

**Tactics:** High-impact, post cards, email, phone calls, outbound call cleansing.

**Results:** Created 3 new clients out of 1 wave of mailing, paying for the campaign.

## Case Study – Perficient

**Client:** IT consulting firm from Texas.

**Purpose of Campaign:** Generate IBM software leads.

**Tactics:**

- Year-long program of direct mail, events, phone calls. Primarily a “stay in touch” campaign using direct mail each month, webinars and seminars in every geography (more than 10) every month.
- All messaging was themed (portal, portal, and more portal).
- Campaign was external and to partners (i.e. IBM).
- List wasn't targeted, went out to thousands, but once we touched, the message was refined further.
- Campaign was also targeted to sales reps inside IBM

**Results:** Generated well over 500 leads and resulted in many new clients and new work in many existing clients because we expanded their vision. Many more clients resulted from introductions from IBM sales reps post campaign.

## Case Studies – AppointLink (SeatGen)

**Client:** Student management software, specifically the top 100 law schools.

**Purpose of Campaign:** Generate new opportunities

**Targets:** The deans and admin staff.

**Tactics:**

- Very targeted lead generation.
- Only a postcard series and Micro site.

**Results:** Off the chart response rates so far. We had over a 20% response rate to 1st mailer and 25 new opportunities have been identified in just the last month. This is only 2 months old, so newsletters, events, etc. haven't even kicked in yet.

## Case Studies – St. Louis (RCGA)

**Client:** St. Louis Regional Chamber and Growth Association (RCGA) is the chamber of commerce and economic development organization for the bi-state St. Louis region.

**Purpose of Campaign:** Generate attendance at big event. An 8 month campaign focused on filling up an event that brought life science and IT together for a summit in St. Louis.

**Tactics:**

- Direct mail
- Advertising
- Public Relations
- Email & microsites and social networking software

**Results:** Quadrupled the sponsorship money and sold out the event. This event was very viral - included letters the board could send out. Presented like an event you couldn't miss.



The Delve Group, Inc.

We look forward to continuing our conversation about this initiative.

The Delve Team

[www.delvegroup.com](http://www.delvegroup.com)