

# Case Study

## Lead generation “from zero to automation” - a methodology

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### The Challenge

The challenge at SaaS Inc., a hypothetical Software as a Service company, was how incremental marketing spend would generate the right number of leads. There was no direct relationship between marketing spend and deals closed. The Sales team was left to find their own leads, wasting their valuable time. Marketing spend went equally into the good the bad and the ugly. There was a reliance on labor-intensive cold calls. There were not enough leads. There must be a better way!

### Market and capability feedback

Step one was to drive increased market feedback to begin a steep learning and iterative adaptation process. One innovation was sending out surveys in rapid succession to gain immediate market feedback. Survey results were posted to an internal blog for all management to see. [ask me and I can demo this]

### Emphasis on rapid cycle time

Once a framework was in place to track the right results, an emphasis was placed on experiments with a rapid cycle time (combined with cost effectiveness), which ensured our

campaigns produced results as quickly as possible.

### Allowable acquisition cost

We looked at several methods for calculating the allowable acquisition cost and settled on a more sophisticated calculation which accounted for time value and the cost of capital. Based on this calculation we knew what could be spent to acquire customers while maintaining the target return on capital invested.

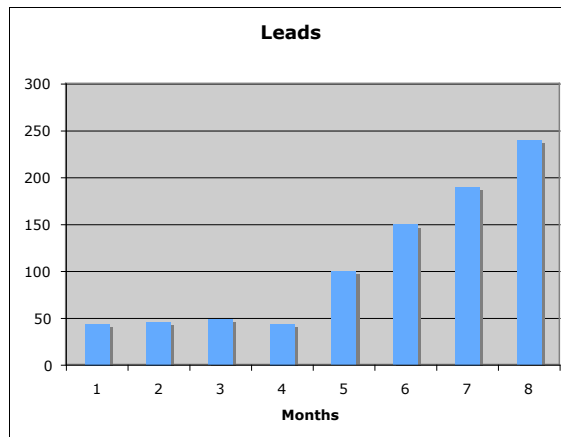
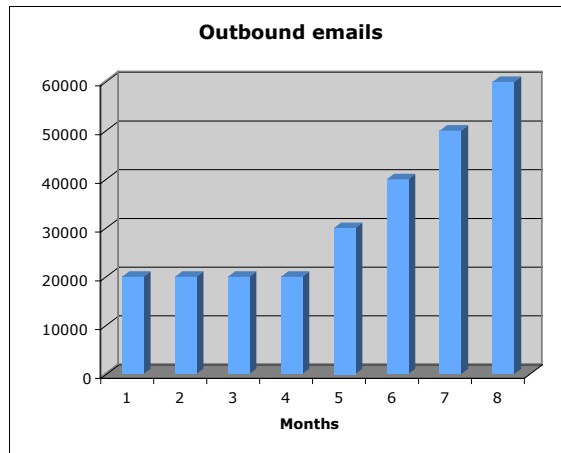
### A unique set of events that worked for SaaS Inc.

Based on the allowable acquisition cost we determined a potential sequence of events that we theorized could produce customers at the right cost. Then we optimized across sequences of events, front-end offers, and we even optimized by action within each sequence of events. An example of a successful sequence of events might be a. send out email survey b. qualify based on answers c. segment response d. outbound contact depending on segment.

### A model that can scale

Once a certain sequence of events produces results at the right price we can push out the working model to other media.

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We used a unique response-feedback mechanism to analyze the audience represented by each individual media outlet – for any variable we desired (within reason). We have relationships with these media and we know what their rates should be!

## Automation

Once a sequence of events is proven we implement automation. With automation you can scale the successful marketing activity with-

out a commensurate increase in manual labor. Typically we recommend a tool if the client does not already have one and depending on the CRM we can integrate the tool within 4-6 weeks.

## What does the salesforce get?

The salesforce gets access to qualified leads pushed to the CRM in an automated fashion. Leads are scored on a sophisticated basis including size, recency, interest and actions. The sales person can see detail such as what that person answered on a survey, what they downloaded and what web pages they visited.

## Is this replicable?

Other companies can use this methodology to achieve a systematic lead generation process.

- The optimal tools will differ in each case
- The experimental outcomes will be different in each case
- And therefore the successes will be different in each case

Typically when we take what worked at one company and apply it to another company it does not work, and this is why a good methodology is needed to get to the breakthrough in each new situation.

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