

Lead Gen Reporting

What we are trying to achieve

- Determine the effectiveness of past and current marketing campaigns
- Track opportunities from ASR appointments to their original marketing campaign
- Use findings to determine 2009 marketing initiatives

2008/2009 No. of meetings per source

- Total Number of meetings made by ASRs from 2008 and 2009 marketing campaigns = 195

* 288 meetings have been made from ALL marketing campaigns

Breakdown:

- Total Number of meetings from events = 65
- Total Number of meeting from Online Campaigns = 72
- Total Number of meetings from OTM = 23 (5 of these are Rainmaker Leads)
- Total Number of meetings from Mobility Seminars: 3
- Total Number of meetings from Other sources (ASR created): 9
- Total Number of meetings from Search Engine: 3
- Purchased List: 7

Marketing Campaigns associated with ASR generated Opps

- Total Number of opportunities created by ASRs from all marketing campaigns = 38
- Breakdown:
- Total Number of opps from events = 3
- Total Number of opps from Online Campaigns = 8
- Total Number of opps from OTM = 8 (5 of these are Rainmaker Leads)
- Total Number of opps from Mobility Seminars: 5
- Total Number of opps from Other sources (ASR created): 10
- Total Number of opps from Search Engine: 1
- Purchased List: 3

Issues we are running into

*updating the Lead Status:

-Most of the RSMs and ASRs are updating the lead comments section, and the task section when they contact a lead, but we are not able to report on those sections.
Need to get them focused on updating lead status

*updating Lead Ranking:

-These rankings help us determine the quality of leads
-This is an important section because it allows us to see if a high number of good/bad leads are coming from a similar source or campaign.

*Campaigns:

it seems that one of the ASRs was removing the original campaign that a lead was a member of.

This gets in the way of determining the return on investment different campaigns, especially if that lead turns into an opportunity.

All leads in the ASR campaign should always have at least 2 campaigns attached to it, this would be the ASR campaign and whatever the source campaign would be, such as a Data connectors event.

Opportunities:

- RSMs need to update all opportunities in SFDC
-Some of the RSMs were getting rid of the original campaign that a lead came in from. Again, this gets in the way of figuring the return on investment for events, purchased lists, and OTM.

Lead Status and Lead Ranking

Lead Status

New Lead
ASR Active – Calling
RSM Meeting
Do Not Call
Call Back
SMB Working
SMB Demos
Stage 2: First Meeting
Stage 3: Second Meeting

Lead Rankings

D: Could Not Reach
L: Lef Company
A: Good Contact, Good Company
B: Suspect Contact, Good Company
C: Bad Data

Requirements

What we need to be able to create accurate reports

ASR & RSM team need to input valid and detailed data immediately.

More qualitative and quantitative information provided by both teams on marketing programs.

Marketing should always be made aware of any changes that is made to salesforce that affects lead reporting

Working with Alex (consultant from CRM) to learn more about salesforce and the comprehensive reports that can be created.