



# Lead Management Program Transformation of the Year (Emerging Enterprise)

An operations-led initiative that drove transformational change in the people, process and technology of the lead management engine to improve speed, accuracy and agility lead distribution and response.

## THE WINNER



### The Challenge

Historically, the demand generation team charged with marketing Autodesk's construction products focused on running marketing plays that drove a high volume of leads. As a result, business development representatives (BDR) received more leads than they could reasonably work in a single day. The marketing operations (MOP) team recognized that they needed a new approach in order to scale.

Autodesk's global reach and the intricate product portfolio added another layer of complexity. The MOP team supports five BDR teams globally across three geographic regions. Lead follow up is accomplished in 10 different languages. The product portfolio includes more than a dozen offerings that span the complex construction industry lifecycle. Autodesk needed to create a personalized buying experience with enough complexity and automation to support an ever-growing sales and marketing team.

### The Operational Approach

Change began with alignment between all teams and a commitment to improving their lead management processes. First, lead scoring was implemented so that only high-quality leads were handed off to the BDR team. Next, Autodesk used LeanData to implement complex routing rules, lead-to-account matching, and enforce service level agreements (SLAs) to ensure the right leads were delivered to the right people at the right

time. If leads are not worked within a specified time, they are reassigned to another team member. Managers use weighting and capping rules for performance management.

The final step in Autodesk's new lead management process involved routing leads into a specific Outreach sequence, populated with content targeted for a particular customer profile.

### Operational Results

As a result of Autodesk new lead management program, the marketing and sales teams are equally invested in ensuring that leads are high quality, enriched reliably, and worked to completion. With changes in place, Autodesk was able to reduce the size of the BDR team while still maintaining consistent conversion rates.

The newly created automation frees the BDRs from manual tasks, allowing them more time for revenue-generating activities. BDRs are now equipped with scoring signals, dynamic content, and coaching notes prior to making a call. They also have increased visibility into the prospect's campaign engagement. Important metrics and tracking are now available in Salesforce and Looker reports and dashboards. BDRs know the leads they should work and managers have the metrics to hold them accountable.

Other positive outcomes include:

- Lead-to-Stage One Opportunity conversion rate increased from 2% to 10%
- Worked leads increased from 60% to 99%
- Leads are now worked within one business day of receipt

"Optimizing for speed-to-lead is key in any organization that is dealing with heavy competition in their market. Every person who did not receive proper follow up is a potential success story for our competitors. It was imperative for us to connect with our leads as quickly as possible. Implementing and enforcing SLAs set expectations and delivered results."

Robyn Courtney, Sr. Marketing Operations Manager, Autodesk