



Lead Management Program Transformation of the Year (Large 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

Rocket Software was experiencing a variety of challenges in their lead management processes. With limited insight into the performance of lead sources, it was difficult to determine which were most effective in driving conversions. There was also a lack of visibility into the sales funnel, making it tough to track a lead through various sales stages.

While Rocket Software preferred to work with the Contact object in Salesforce, records were categorized as leads, which limited visibility into the entire account. Working with Contacts also required more time and research. Since Contact roles were not leveraged effectively, this prevented Rocket Software from creating Opportunities within Salesforce and ultimately resulted in an incomplete view of the customer journey.

The Operational Approach

Rocket Software's approach to solving these challenges involved a comprehensive, iterative strategy aimed at enhancing lead qualification, optimizing marketing and sales processes, and improving their understanding of the buyer journey.

Rocket Software first developed distinct scoring models for each business unit. This helped to better identify high-potential prospects. Next, by restructuring Marketo, Rocket Software could monitor and analyze a potential buyer's progress at each stage of the funnel. Prospects were segmented within the

funnel, allowing for personalization in marketing and sales strategies. To re-engage with Closed-Lost leads, Rocket Software implemented lead recycling procedures to maximize re-engagement opportunities.

Last, to streamline the handoff process between Marketing and Sales, Rocket Software introduced functionality that alerted Sales Representatives of incoming qualified leads and implemented service level agreements. This improved overall lead management.

Operational Results

By making significant improvements to their lead management processes, Rocket Software has experienced remarkable results. With their new scoring models, they can identify and engage with high-potential prospects faster, resulting in accelerated sales cycles and improved conversion rates. This data-driven approach has directly translated into more closed deals and increased revenue. Rocket Software now has the visibility they need to understand what strategies are working and how best to engage with buyers.

Other measurable results include:

- Increased lead velocity for MQLs by 75%
- Increased visibility into the funnel journey
- Streamlined lead management processes

"By adopting LeanData in our routing, we were able to streamline lead routing processes, ensuring that leads were efficiently and accurately routed to the right teams or representatives. This improved lead assignment and distribution, reducing response times and enhancing the overall customer experience."

Alex Wolff, Senior Manager, Marketing Technology & Operations, Rocket Software