



Fixing Your Leaky Funnel:

# HOW TO MAXIMIZE MARKETING'S EFFORTS AND SALES' TIME

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# INTRODUCTION

The funnel is—in theory—a well-oiled machine that pulls in leads and converts them into customers in an organized and efficient manner. The funnel gives the Marketing team tools to help identify when leads become qualified and ready to deliver to the Sales team.

After all, Sales can't possibly speak with every lead—and it wouldn't be an economically sound strategy, either. This is why the funnel is such an important tool. With the funnel, only the best, most qualified sales-ready leads are sent to the bottom of the funnel where Sales picks them up, contacts them, and sells your product or service.

Wouldn't it be nice if it was this easy? Companies invest a significant amount of time and money to ensure that the funnel is full, because the more leads you have in the funnel, the more sales you'll make. However, although many organizations focus their energies on all stages of the funnel and filling it with as many contacts as possible, eventually the funnel starts leaking, leads drop off, and conversion rates become a fraction of what they could—and should—be.

“The more leads we can get into the top of the funnel, the more business we'll end up with, so we looked for marketing technology to help us with that,” said Kate Cindric Federhar, Director of Marketing Operations at Lumen Technologies.

Leaks in the funnel occur for a variety of reasons: There are people in the funnel who shouldn't be, people who should be in the funnel aren't, people get wrongly positioned in the funnel, and so on.

Imagine a scenario in which the Sales team calls a marketing qualified lead who is supposedly eager to buy, only to find out that the lead just discovered the brand. Selling too soon not only turns potential customers off, but also wastes Sales' time—both mean lost revenue.

In fact, misalignment between Sales and Marketing costs companies as much as \$1 trillion every single year. When marketing struggles to determine which leads are sales-ready and the Sales team receives unqualified leads, the entire sales cycle can fall apart. But it doesn't have to. When Marketing and Sales are properly aligned, your business can close more leads and experience higher marketing revenue.

This eBook offers several tried-and-true methods and best practices for identifying where leads are being dropped, how to better align Sales and Marketing, and how to patch up the leaky funnel to maximize Marketing's efforts and save your Sales team's time to qualify more customers and seal more deals.



“Misalignment between Sales and Marketing costs companies as much as \$1 trillion every single year.”



# DEFINING THE FUNNEL

Most Marketers are well acquainted with some version of the funnel and its impact on how organizations track, manage, and convert leads. Here is one popular funnel:

In this example, the top of the funnel is the Marketing team's responsibility, and the bottom falls to the Sales team. The middle of the funnel is the responsibility of both Marketing and Sales, and this is where most of the leaks happen. Although different companies sometimes have their own terminology, MQL and SQL are the most common terms associated with leads in the middle of the funnel:

- Marketing Qualified Lead (MQL):** These are leads that have a high level of interest and meet certain lead-qualification criteria (e.g., someone who downloads an eBook and is a decision-maker at the company, such as a CEO or VP).
- Sales Qualified Lead (SQL):** These are leads (who usually have already met the definition of MQL) that the Sales team has qualified and determined to represent solid opportunities.

There is one caveat to this model with B2B sales, however, and that is the Sales Accepted Lead (SAL), which falls between MQL and SQL. In the sales pipeline, an SAL matches key targeting criteria and is believed to be ready to buy, based

on a followup assessment by a Salesperson. In essence, an SAL shows signs of being ready to buy, but an SQL actually has the approved budget, timeline, and decision-making power to make the final purchase and is thus fully "qualified" by Sales.





# DEFINING THE FUNNEL (CONT'D)

## Account-Based Marketing

Today's B2B buying cycles are complicated, often requiring buy-in from multiple stakeholders whom neither Marketing nor Sales are even aware of. In these cases, B2B Marketing and Sales can benefit from **Account Based-Marketing (ABM)**. ABM takes into account the fact that in many cases, purchasing decisions require the monitoring and nurturing of multiple stakeholders in order to close a sale. At most companies, a team or committee of buyers and influencers, known as a "demand unit," is tasked with solving an organizational problem.

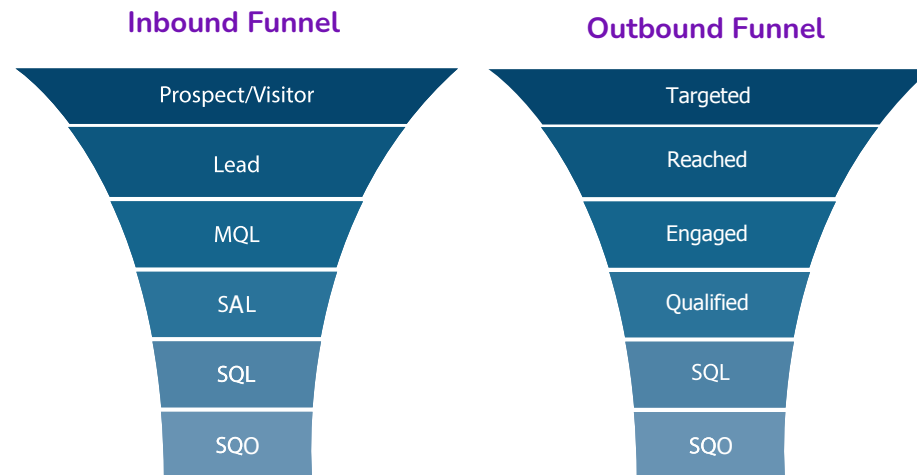
ABM revolutionizes the funnel by examining multiple signals coming from within the same company or account, rather than scoring a single lead to determine how likely they are to convert—thus providing a more holistic view of the prospective opportunity. But it's important to note the difference between **inbound** and **outbound** ABM and where the leak occurs for each of these funnels.

The inbound funnel is essentially the traditional Marketing and Sales funnel. Leaks most often occur in the middle of the funnel where Marketing hands off leads to Sales. Examples include slow Sales follow-up, Marketing passing over a lead too early, or targeting the wrong customers.

To patch these leaks, Sales and Marketing must establish an ideal customer profile and proceeds as follows:

- Identify which accounts to pursue based on the established ideal profile
- Engage with and prioritize those leads
- Reach out to leads in a personalized manner
- Close the deal by making a sale

The idea here is for the Marketing and Sales team to focus on the demand units for specific accounts and move them through the sales pipeline efficiently.<sup>4</sup> Marketing and Sales have to work together in this model to persuade every member of the demand unit to work with your organization throughout every stage of the sales cycle—and sometimes different stakeholders are at different stages of the sales cycle. Taking into account everyone involved in the decision-making and buying process should result in more closed sales and greater revenue.



Outbound ABM most often experiences leaks at the top of the funnel. If Sales doesn't know which accounts to go after or how to prioritize outreach, opportunities are missed. Even when connections are made, it's often too late—either because leads are in consideration with other offerings or because their interest has gone cold. The fix is more clarity into the intent data, determining the right moment strategically to touch an account, and promptly and persistently pursuing the account.

## MEASURING THE LEAK

Before you can institute a change to better align Sales and Marketing and fix your leaky funnel, you'll need to determine your conversion rates at each stage of the sales process. This means carefully determining the following conversion rates:

- Prospect to MQL
- MQL to SAL
- SAL to SQL
- SQL to customer (revenue gained)

Determining each of these metrics can provide a good picture of efforts being made across Marketing and Sales and where leads are being lost. For example, if you're in the Telecommunications industry and your sales team starts with 115 SQLs and closes 65 sales, your SQL-to-customer conversion rate is 56.5 percent.

Some companies may also choose to evaluate conversion rates by looking at a specific period of time and dividing the total number of leads generated by the number of sales opportunities created or customers gained during that period. It's also worth assessing the lead value (Lead Value = Value of Sale/Number of Leads) in order to determine what kind of conversion rates (Conversions Needed = Desired Revenue/Lead Value) will help both Marketing and Sales reach the desired goals.

With these figures in hand, you can compare your results against those of others in the industry through Google research and reports. You can also find industry standards by reviewing relevant case studies or even reaching out to industry colleagues who work at companies offering a similar product or service to yours and that are fairly equal in size, locale, and scope.<sup>5</sup>

Lastly, look for trends and track performance over time across both sales and marketing. The focus of tracking might include:

- **Demographics:** lead title, email domain, job functions
- **Firmographics:** company name, location, industry
- **Behavior:** links clicked, content read/watched

Documenting this data will reveal any correlation between a lead's advancement—or lack thereof—through the funnel and conversion. Additionally, it can help uncover any shortcomings within teams, such as whether marketing is failing to pass on qualified leads with a personal email address or if the Sales team is avoiding followup opportunities within specific industries.

With all of this information at hand, you are now ready to determine the source of your funnel's leaks.



# FINDING THE SOURCE OF THE LEAK

Your Sales and Marketing funnel could be leaking for any number of reasons, but most of the time it comes down to a misalignment of Marketing and Sales. More often than not, Sales complains that Marketing is delivering unqualified leads, and Marketing complains that Sales isn't taking the time to nurture and convert the leads they've been given. But it goes much deeper than this.

## Missing the Mark with an Early Handoff

When a lead is handed off to Sales too early, that individual may become a victim of the leaky funnel. These are the four most common reasons behind early handoffs:

### 1. Poor or nonexistent lead qualification

**standards:** Many companies haven't taken the time to establish a company-wide definition of a sales-ready lead. Without a solid definition, Marketing people may not know what constitutes a sales-ready lead and when is the best time to hand one off.

**2. Missing data:** Sales needs to be given the right contact information in order to reach out to a prospect. Poor documentation of phone numbers, email addresses, or prospect job titles means your Sales team isn't properly equipped for sales. If Marketing hands off a lead without the appropriate intel, Sales can't act.

**3. Bad lead-scoring algorithms:** Lead scoring not only improves the alignment of your Marketing and Sales forces, it also helps Sales to follow up with the best leads first, which improves sales conversion rates. Using the wrong lead-scoring algorithm can do more damage than having no algorithm in place at all.

**4. Poor targeting:** If Marketing isn't properly targeting its content, leads will likely come from sources that convert poorly or that don't match the ideal customer profile. These poor leads are then handed off to sales when they aren't sales ready.

These top-of-funnel leaks naturally occur if there is a lack of coordination between the Sales and Marketing teams, which is why it's critical to work to align these two departments.

## Failure to Follow Up

One of the biggest failures in the sales cycle is a lack of persistence. In 2017 alone, a shocking 77 percent of companies undertouched their leads. Although some leads<sup>6</sup> will respond to a sales inquiry the first or second time, it can take as many as 18 follow-up calls to connect with a potential buyer<sup>7</sup>. Most sales leads require at least six follow-ups, but many Salespeople give up after only one or two attempts. Your Sales team must be prepared to be persistent and timely with their outreach so leads don't fall out of the funnel.



## Insights:

Only 4% of companies reported making at the optimal 11 attempts to contact a potential buyer. Companies with the most rapidly growing revenue were the most likely to contact a lead 11 to 15 times.<sup>8</sup>



# FINDING THE SOURCE OF THE LEAK (CONT'D)



## Nurturing Leads Based on Bias

Another source of a funnel leak is Sales bias. Sales teams sometimes make assumptions about leads that prevent them from even attempting to reach out, such as “PPC leads never convert” or “all personal email addresses are unqualified.” This results in cherry-picking—nurturing only the “ideal leads” and letting other opportunities go untouched. Although this practice might make sense for individual Sales Reps as a time-management strategy, the net result is a significant leak in the funnel.

## Lack of Operational Excellence

High conversion rates are usually achieved through operational excellence, and a lack of operational excellence—for example, loose workflows and poor processes—can cause a leaky funnel.

Operational mistakes that can cause leads to drop out of the funnel or go cold in the CRM include:

- **Inefficient lead routing:** Leads are routed to the wrong Rep or territory, or are otherwise unassigned, meaning they are ignored and receive zero follow-up.
- **No nurturing process:** Once a lead goes cold, Sales and Marketing often don't have

a strategy for engaging or re-engaging the lead, which means the lead falls out of the funnel completely and permanently.

- **Bad timing:** In some cases, leads are routed to Reps who are on vacation or otherwise unable to follow up in a timely manner.
- **Missed connections:** In some cases, Sales Reps think they have followed up with a lead when, in fact, they haven't. Having an intelligent CRM in place can help avoid these mix-ups.
- **Undefined or poorly defined roles:** Without clearly defined roles and responsibilities, Sales and Marketing employees can make incorrect assumptions about who is doing what, and this can be hugely detrimental to relations with potential customers. Instituting a service-level agreement (SLA) between the Sales and Marketing departments can serve as a clear outline of responsibilities, expectations, and accountability for each step of the sales process so potential customers don't become victims of a fumbling team.

Once you've identified the source (or sources) of your leaks, you can patch up your leaky funnel and begin to align Marketing and Sales to qualify better leads and secure more sales.



# GETTING ON BOARD WITH FIXING THE LEAK



Letting leads fall out of the funnel because of internal misalignment between Marketing and Sales costs companies nearly \$1 trillion every year—but the truth is that the value of fixing the leak is priceless. Yes, fixing the leaky funnel will help boost your revenues by aligning Marketing and Sales to create a seamless sales environment, but it will also create a better experience for prospects, leads, and customers.

Additionally, for many modern Marketers, success is measured not just in lead generation volume, but also on the Marketing department's contribution to the Sales pipeline—the number of meetings generated and opportunities created. So when the Sales team is able to close a sale, it's a win for Marketing too. Fixing the leak means aligning Marketing with Sales so that both teams are working cohesively, efficiently, and successfully to convert leads and generate sales.

“For many modern Marketers, success is measured not just in lead-generation volume, but also on the marketing department's contribution to the sales pipeline.”

# FIXING THE LEAK FOR GOOD

To fix a leaky funnel, consider the following methodologies.

## Create a Lead-Scoring Model

Most Marketers are at least familiar with the idea of lead scoring as a method to determine when to hand off leads to Sales. A predefined threshold enables marketing professionals to determine whether a lead is ready to move to Sales or if they need to nurture it a bit further before handing it off to the Sales team.

Sales teams use lead scoring to prioritize their efforts in order to spend the most time on the best, most qualified leads. A good lead-scoring system will indicate which leads are more likely to close than others based on demographic characteristics, firmographic values, and behaviors.

There are two types of scoring models: **manual** and **predictive**.

## Manual Lead Scoring

For many companies, lead scoring involves assigning arbitrary point values to a lead based on answers submitted on a form (or field values uploaded to a CRM and behavior indicators. A CRM or marketing automation system will assign a lead a total point value based on the criteria your organization sets up.

Typically, the process for creating a manual lead-scoring system is a joint endeavor involving both sales and marketing. A worksheet is employed, such as the one provided by Marketo, which poses the following questions:<sup>9</sup>

1. What are the minimum inflexible criteria a lead must meet in order to become a customer (e.g., “must live in the greater Washington D.C. area” or “must be 21 or older”)?
2. What are the common characteristics that a typical customer possesses?
3. What behaviors are important for leads to engage in (e.g., opening an email, requesting a product demo, downloading an e-book, posting a social media share)?
4. Are some characteristics or behaviors more indicative of good leads than others, and if so, which scoring items should be weighted more heavily?

Ultimately, however, manual lead scoring is only a best guess based on sales' and marketing's gut feelings for those point values. In fact, the wrong lead-scoring system can do more damage than having no system at all.

## Predictive Lead Scoring

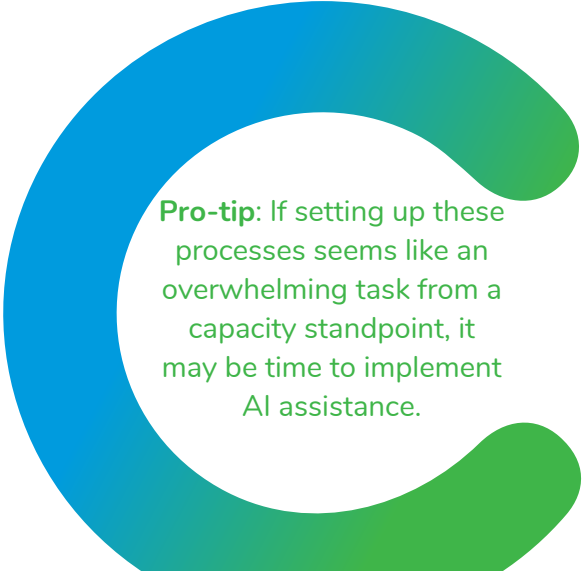
Predictive lead-scoring is another way to ensure the sales team is receiving the most qualified leads possible. Once an organization has enough data in its CRM, a predictive lead scoring solution can automatically determine the best model of demographic, firmographic, and behavior indicators (based on existing customer data) to score future leads on their propensity to close.

Predictive lead scoring does have its limitations, though. For it to work, the intake and CRM data must be clean, accurate, and include demographic and behavior data as the leads interact with a company. Also, understand that some leads will be scored incorrectly due to visitors' using multiple email addresses (personal and business) and devices. Again, this system is imperfect, and it could do more harm than good if your data aren't up to date or accurate.

## Manage Lead Routing and Handling

Ensuring that leads go to the right person is another way to guarantee that leads receive the right follow-up at the right time, so it's important to ask a few questions:

- Whose job is it to follow up on leads?
- Is there a reliable lead strategy in place?
- Are leads being tracked in a CRM?
- Who is responsible for rerouting leads?
- Whose responsibility is it to remove bad contacts?



**Pro-tip:** If setting up these processes seems like an overwhelming task from a capacity standpoint, it may be time to implement AI assistance.

# FIXING THE LEAK FOR GOOD (CON'TD)

Once these questions are answered, you can establish routing based on different segments, campaigns, targets, and so on. To convert a lead, the routing rules must ensure the following:

- The right leads go to the assigned sales development rep (SDR) or business development rep (BDR) at the right time.
- The SDR/BDR is able to follow up with the lead in a timely manner.
- The SDR/BDR receives a notification when the lead is ready and has the right intel and information to engage the lead.
- The SDR/BDR is able to pass the lead on to the account executive (AE) to close the deal.
- The SDR/BDR or AE is able to reroute the lead, if necessary, back up the funnel to marketing for nurturing.
- The SDR/BDR or AE is able to remove leads from the funnel if the leads aren't interested or the contact information is bad.

Proper management of these details will undoubtedly seal the leaks in your funnel. Better yet, when your reps share a common language and use standardized lead-handling mechanics, your managers will be able to act on reliable data instead of best guesses.

## Establish a Service-Level Agreement

Achieving operational excellence can be difficult in a complex environment, but with an SLA in place, sales and marketing are guaranteed to have a shared sense of accountability—and success.<sup>11</sup> An SLA is a contract that details the roles, responsibilities, and

best practices for both marketing and sales in order to align the teams toward the shared goal of driving revenue upward.

Some important elements of an SLA include:

- **Follow-up time frame:** Best practices recommend following up with all inquiries within five minutes of the prospect's making contact. In order to make this happen, however, you must be aware of CRM system sync delays (i.e., if a hot lead comes in and it takes 25 minutes for the system to sync and the sales rep to be notified, this isn't a great setup).
- **Frequency of follow-up:** According to best practices, a salesperson should reach out to a lead at least eight times before throwing in the towel. With every single follow-up, the odds of qualifying the lead go up, so it doesn't hurt to be persistent, within reason.
- **Personalization of follow-up:** Best practices point to using at least four points of personalization for nurturing and moving leads through the funnel, whether this is the person's name, industry, job title, or some other piece of accurate data.
- **"Reachability" of follow-ups:** To ensure that follow-up emails reach their intended targets, make sure they are short and to the point, personalized, include as few links and images as possible, and avoid words and punctuation that can trigger spam filters (e.g., words such as cash or money, and excessive exclamation points).

## Using Conversational AI in Tandem with ABM

Conversational AI and Account-Based Marketing both have their respective strengths. ABM provides data and insights to better target prospective accounts, and Conversational AI delivers personalized, human-like outreach at scale. When these two technologies are used together, Marketing and Sales teams revolutionize how they prioritize target accounts and accelerate opportunities.

Conversational AI plus ABM can:

- Meet customer demands for digital-first self-service, accelerating handraisers at the moment they express intent,
- Meet expectations for hyper-personalized customer experiences across multiple channels,
- Improve promptness, persistence, and performance when it comes to lead outreach,
- Prevent leaks in the funnel by following up on every opportunity and ensuring smooth transitions between Marketing and Sales teams.

When used in tandem, Conversational AI and ABM offer the unparalleled ability to target the right customers with the right messaging at the right time, at scale.

### Insights:

Only 13% of companies report responding to an inquiry within the first five minutes. However, the odds of qualifying a lead by following up within the first five minutes are 21 times higher than if you wait even 30 minutes.



# FINDING THE SOURCE OF THE LEAK

Sample wording in an SLA might look like this:

- **Prompt:** Leads will be routed to appropriate SDRs, who will then follow up on all leads within five minutes of receiving a notification via telephone and email.
- **Persistence:** SDRs will then continue outreach for at least eight attempts within two weeks if prospects are unresponsive.
- **Personalization:** Additionally, SDRs will include at least four points of personalization if personalization data is available.
- **Performance:** SDRs will follow defined best practices to increase the likelihood that emails land in a lead's inbox instead of the spam folder.

An effective SLA should also include measurable metrics in order to hold teams accountable, assess successes, and determine room for improvement. For example, if leads aren't being followed up on, who needs to be notified? All metrics outlined in an SLA must be tied to the objectives of marketing and sales throughout the funnel in order for the SLA to be successful and effective.

Here is an example of what an accountability clause in an SLA might look like:

- SDRs will lose the ability to follow up on a lead if not touched within 30 minutes of receiving the lead. Additionally, team leads/AEs will be notified if unresponsive leads do not receive 10 outreach attempts within two weeks of an initial inquiry.

The lead-scoring threshold for handoff and routing rules may also be outlined in an SLA for a comprehensive view of lead management.

Ultimately, marketing and sales have the same goal: both teams want to convert website visitors and other leads into paying customers in order to boost revenue. An SLA gives the sales team the latitude to provide feedback to marketers if lead quality is lacking; and marketing has recourse to reroute leads that are not followed up on in a timely manner.

If capacity is a concern, this is where automated lead engagement can play a powerful role.



## FINDING THE SOURCE OF THE LEAK (CONT'D)

### Implement Automated Lead Engagement

Lead-scoring models can be faulty. Leads may be routed to the wrong person. Sales may not follow up in a timely manner. All of these contribute to a leaky Sales and Marketing funnel and can be addressed by following the recommendations outlined thus far, by paying careful attention to the issue, and through dedicated resource alignment.

“Marketing and Sales have the same goal: both teams want to convert website visitors and others leads into paying customers in order to boost revenue.”

One additional tactic to consider is implementing automated lead engagement, which addresses all of these issues. With automated lead engagement, your organization will never lose a lead.

An automated lead engagement system automatically engages with prospects as they come in through the top of the funnel and seamlessly passes them to the Sales team when appropriate—all through the power of artificial intelligence (AI). Even better, when numerous stakeholders are associated with a single decision-making process, AI can nurture each member of that demand unit or committee at the appropriate pace to get everyone on the same page at the same time.

Implementing automated lead engagement allows the Marketing team to ensure that leads are nurtured using SLA criteria—and it all happens automatically, quickly, accurately, repeatedly, and with personalization. Automated solutions also act without bias; they do not discriminate based on type of email address, industry, or any other factor that can inhibit follow-up.

With an AI Assistant, organizations can expect 100 percent follow-up on 100 percent of leads—all without tying up Marketing or Sales teams.

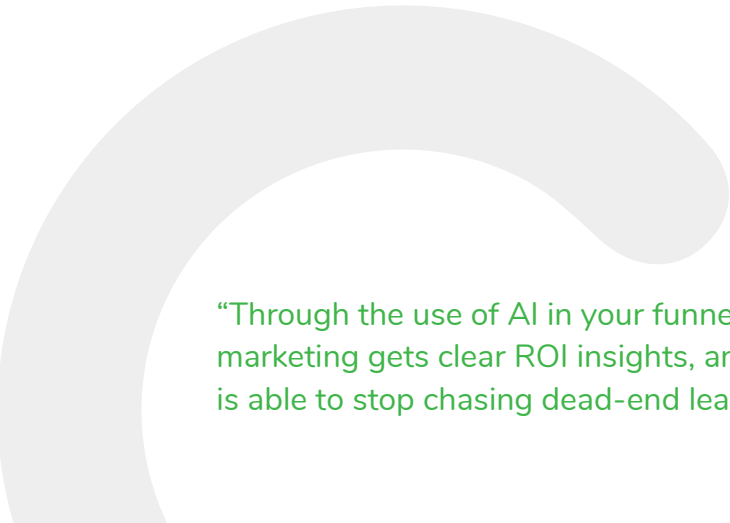


# CONVERSICA: THE ANSWER TO FIXING THE LEAKY FUNNEL

By aligning Marketing and Sales, it becomes easier to identify how and why leads drip out of the funnel—which can save companies thousands and potentially millions of dollars in lost revenues and wasted time. Whether the problem is fixed through creating a lead-scoring model, refining leadhandling processes, implementing an SLA, or introducing an intelligent, automated lead engagement solution, the ROI of these efforts cannot be understated.

The right AI software uses real conversations to help organizations discover the most qualified sales opportunities by engaging every lead 24/7/365. AI Assistants knowhow to nurture leads and when leads are ready for sales follow-up. And the best part is that AI Assistants never call in sick—so missed connections and concerns about timely outreach become a thing of the past.

Through the use of AI in your funnel, Marketing gets clear ROI insights, and Sales is able to stop chasing dead-end leads. The result? You get better leads from Marketing, happier Sales Reps, and a healthier bottom line.



“Through the use of AI in your funnel, marketing gets clear ROI insights, and sales is able to stop chasing dead-end leads.”





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## About Conversica

Conversica is the leading provider of Conversational AI solutions that help enterprise marketing, sales, customer success, and finance teams attract, acquire and grow customers at scale across the customer revenue lifecycle.

Conversica AI Assistants serve as digital team members and autonomously engage contacts, prospects, customers, or partners in human-like, two-way interactions at scale to drive towards the next best action, whether that's scheduling a sales meeting, gauging interest to buy additional products or services, or politely but persistently collecting overdue payments.

Processing over a billion interactions, the Conversica Conversational AI platform integrates natural language processing (NLU & NLG), decision &

policy management, business process automation and deep learning capabilities to drive customer engagement across multiple digital communication channels and languages.

The Conversica platform supports over 50 integrations into the most popular MAP and CRM platforms and offers an open API for custom integration.

To learn more, visit [www.conversica.com](http://www.conversica.com) and follow the company on [Twitter](#), [LinkedIn](#) and [Facebook](#).

