

# White Paper



## Critical Success Factors in Outbound Lead Generation and Call Campaigns

An Executive White Paper  
Released: October 2, 2010  
Revised: July 2, 2019

## Executive Summary

Outbound Lead Generation can be an essential element to keeping the sales funnel full of new opportunities. When done properly, it can be a key component to any campaign. It can also be fraught with error, pitfalls, and inefficiencies. It can be a smart investment, or a bad dollar spent; bad ROI. There are some fundamental elements that can significantly improve your chances of success and improve your ROI. This document explores and details these elements and offers approaches to each.

## Problem Statement

Lead generation, while seemingly elementary on the surface, can have a good deal of complexity that hinders proper execution. To the untrained eye, lead generation is as simple as pairing a few people with telephone skills and a list of prospects to call. While these are two essential elements, they are not the only two. In fact, *successful* lead generation is the carefully coordinated efforts of multiple organizations, the implementation of some complex technologies, and the availability of great quantities of quality data. When done properly, it keeps your sales funnel full of prospects. When done poorly, it costs you time, money, and energy -- three resources none of us have in sufficient quantity to waste.

## Related or Contributing Issues to Poor Performance

There are some common and core issues that tend to be present when lead generation efforts struggle. Here are some issues that may not be in the forefront of your mind:

- **Lack of focus by Sales, Marketing, or both** – It takes coordinated efforts from both to be truly successful (more details below). A lead gen agent distracted by other tasks or pulled to other duties will never make the calls/contacts needed to succeed.
- **Poorly integrated IT systems** – Paper, spreadsheets, and emails do not a lead generation system make. Be prepared to invest in IT to maximize your efficiencies.
- **Poorly trained or inexperienced Call Center staff** – On-the-job training is far more expensive than you think. Source data (calling list) is too expensive to waste as training fodder for your new reps.
- **Lack of urgency** – Lead generation resources (calling agents) are just like aircraft for an airline. Every time a plane takes off with an empty seat is revenue they will *never* recover. Each day that a lead generation rep spends without a campaign or call list is eight hours you will never get back. The mindset of, “Oh, just call through the list anyway and see what you get” is a complete waste of time and corporate resources.

## Proposed Solutions and Critical Concepts

### Technology Essentials

For any inbound/outbound calling effort to be successful, you will need to have these baseline technologies as a minimum:

- **Telephony (IP preferred)** – A powerful, flexible, data-oriented phone system that easily tracks and reports call/connect data is a must. Automatic Call Distribution, routing, hunt groups, and inbound identification are required.
- **Detailed & Flexible Reporting** – You will be surprised at how many statistics you will want to retrieve after you start your call center efforts. Start with a system and tools that won't limit your ability later. All reports and statistics must be both delivered on a schedule and in a self-serve format.
- **One-button or auto-dialing** – This saves time for lead generation agents and reduces or eliminates “fat-finger” errors when dialing.

If you are interested in increasing your efficiencies/effectiveness, you should also consider these technologies:

- **“Selling Pages”** - AKA customized web-based mini-presentations specifically designed for lead generation and prospecting (not marketing, not order-taking per se).
- **Lead database and application** – Ensure that the application is call center-specific and not a re-hash or do-over of your CRM system. While a CRM may tout a “call center” module, BE FOREWARNED that most are not tailored to the process of calling, tracking, queuing and revisiting, not to mention progressive messaging and emails.
- **Link your CRM system** - Use middleware to link your CRM to any call center application to keep the two in sync.
- **Closed-loop lead reporting** – This is essential to providing your management the ability to follow a lead from its source to closure. It is the only way to get a truly accurate ROI figure AND improve your campaign spending.

### Know your Audience – The first rule of all communication

Shotgun lead generation is horribly inefficient. Make sure that your outbound calling efforts are targeted, coordinated, and leverage your other marketing efforts/materials. Target your campaigns. Make sure you have a message that is specific and timely. For example, you are going to get a much higher take rate when following up from an event with questions or offers related to that event than you will with just a “blind” call from a generic list.

Make sure that your agents have relevant speaking points for the targeted list and that those speaking points resonate with the suspects. The school of thought that goes: “Here is a list of people from X industry. Call them and see if they need our product,” is a terribly ineffective approach. A much more effective approach might be: “Here is a list

from X industry. There was an announcement that affects most of the companies in that industry. Call and see if they have concerns about said issue and convey that our product Y has helped many companies like theirs address this issue.”

Offering value, assisting with problems, and a demonstrated knowledge of the prospect's industry and issues increase your hit rate three-fold.

### List Quality is Critical

To the untrained eye, a list of targeted prospects is difficult to distinguish from a page out of the phone book. Name, address, phone number...now call them. Unfortunately, this is probably the most common mistake made in outbound demand generation. The suspect list should be a targeted, filtered list of names and phone numbers with the following properties:

- Suspects of an appropriate organizational level (not too high, not too low). CFOs rarely return the calls of lead generation agents. (Most) janitors don't make purchasing decisions.
- Phone numbers that are not call centers, switchboards, cell phones without backup, or receptionists.
- A correlation between target market, product, and promotion.
- Completeness of Information. Time spent looking up phone numbers or calling into call centers is time not spent making productive calls.
- The list provided is from a single vertical market or the target that fits the product offering.
- Categorized into common groups that will respond to a single message or speaking points.
- Organized by geography and time zone for more effective calling.

### Cleanliness is Next to Godliness (in terms of Data)

Once you have a relevant and targeted list, organizing and scrubbing the list are the next steps. By 'scrubbing' we mean removing duplicate records and eliminating known issues (i.e. company is a competitor, just went out of business, etc.).

### Sourcing a List from a Third Party

Our experience with 3<sup>rd</sup> party list sources has been horribly disappointing at best. Here's why: The companies supplying these lists are often just aggregators and many times their data is old. Time works against all lists. People change jobs, companies, names, titles, and in rare cases, genders. A valuable list has the correct person, their current title, a DIRECT DIAL number AND EMAIL. A company name with the wrong person's name and a main switchboard number is WORSE than no data at all. You can find that information yourself using internet tools. Bad data wastes your time, degrades your call efficiencies and costs you a bundle. Challenge any list provider to supply you

with 250 or so random records for you to call and validate. If they won't agree to that request, pass on them; they don't have confidence in the quality of their data.

### Bring All Guns to Bear

One of the quickest ways of increasing your ROI on all your marketing and campaign management is to coordinate the efforts via multiple mediums. A single phone call from an outbound agent may or may not be accepted by the person answering for a variety of reasons even if they have a need. One of the biggest reasons is the fact that they were not expecting the call, might be too busy, or are not open to the message. A call preceded by an email or direct mailing piece increases the effectiveness of all of the mediums. This is something that marketing has known for years. It is referred to as multiple impressions. If a prospect receives an email extolling the values of product X and heralding the inbound call coming in the next week, they are significantly more likely to take the call if there is interest in product X. The email helps cut through the noise and raises your call above the din of the other messages. Marketing managers should include the outbound calling capabilities not only in their planning but in the actual production of the marketing communication piece.

### Consider Sequential or Progressive Messaging

A common mistake made in outbound tele- and email marketing is blasting your message to your entire list in the hope that those who are interested will see the light, be awestruck by the value of your product, and call you. That might happen...sometime. It's much more realistic to leverage that concept of multiple impressions and be keenly aware of the very short attention span of most of your prospects.

We have found great success in using **progressive and coordinated messaging**. Instead of telling your company's entire story and value proposition in one two-and-a-half-minute voicemail (that no one will listen to longer than 30 seconds), create a series of emails and voicemails that are delivered alternately. People will read a longer, well structured email. They need the voicemails to be short. Keep your core message to 45 seconds and limit contact information to 15 seconds. Sixty seconds: that's what you get. Follow-up with an email that **expands** on the voicemail. Using these alternate delivery vehicles allows you to parse out an additional part of your story with each impression. Stick to the compelling value propositions. You can give the reasons to believe later.

### Voice Control and Delivery

This topic is an entire document unto itself, but let's go with the essentials. Know your messages cold. DO NOT READ THEM (or at least sound like you are reading them). Be casual, be cognizant of any voice/tone lilt that gives you up to be an unskilled telemarketer. Do not be monotone. Do not be bored. The telephone is a stage and your callers need to be great actors. Contact us and we'll provide you with a full workshop on this topic.

## Coordination of Sales and Marketing, Their Language & Objectives

Sales and Marketing are two ends of the same string that are rarely tied together. Your goal should be to tie them in a knot. The language used to drive demand (marketing) is different than the language needed to motivate a customer to action (sales/speaking points). In the world of marketing your message must be concise. Many times, the medium you are using requires fewer than thirteen words, like a billboard or printed ad. Many times, the objective of marketing is to build a brand, a position, an image, or create a sense of “feeling” or a sense of “belonging”. Sales, and prospecting which is step one of sales, is more focused on detailed information, specifics, persuasion, and completeness of purpose. The medium used in sales can be extremely high bandwidth (i.e. phone call or face-to-face meetings) that lasts for hours.

So, the focus of the marketing organization is to drive demand. The focus of the sales organization is to close deals. Lead generation sits between these two kingdoms. If executed properly, lead generation will leverage the elements used in the demand generation efforts and move the client into a conversation that converts the “demand energy” into “acquisition energy”. This conversion requires that we move from the imagery and emotion in our marketing efforts and into the facts and specifics of the sales process. And we need to do so without losing that momentum but instead converting that momentum into the energy that helps a prospect select your solution.

## About Top Gun Sales Performance and the Author

**Top Gun Sales Performance**, based in Mason (Cincinnati), Ohio, is focused on helping medium and large companies increase their sales capabilities without increasing their headcount. Top Gun provides tools, training, technology, and outsourced resources needed to build a best-in-class selling organization. These services include training for your selling professionals, inbound and outbound call center for lead generation and customer support, sales specific IT support (CRM, customer facing applications), and media and event production services.

**J Steven Osborne** is Founder and CEO of Top Gun Sales Performance. Early in his career he served as a team leader for GE in their IT and Customer Support Center. As CEO of Top Gun, Steve works directly with top executives to help them solve their pressing issues. Top Gun Sales Performance provides lead generation services and inside sales support to some of the world’s best-known companies.