

# Destination: Sales and marketing alignment.

DemandGen International® helps Concur, a leading B2B provider of integrated travel and expense management solutions, target prospects.

## SITUATION

The primary obstacle facing Concur's sales and marketing teams was scaling the growth to engage different industries and companies with different products, specifically mid-market and enterprise organizations. The company sought out a systematic way to identify prospects, strategically address pain points and nurture those prospects immediately with relevant information.

"There weren't clear funnel definitions between sales and marketing during the entire sales process," explained Greg Forrest, Sr. Director of Marketing Operations & Demand Central for Concur. "We had service-level agreements with sales that were based on campaign type and were confusing. Lead quality was spotty and we didn't have a way to report on inquiry-to-closed-business funnel metrics."

Concur's main business goal was to develop a process and taxonomy that would align sales and marketing teams, according to Forrest. Next, the company wanted to deploy a demand generation platform that would produce quality revenue performance management reporting. Additionally, Concur wished to develop automated core programs to help prospect progression become more systematic.

To improve efficiencies and increase overall revenue, sales and marketing noted that a key element of an optimal lead management approach would be leveraging a lead scoring method that seamlessly moved prospects through the funnel based



## SITUATION

Inefficient lead management led to spotty lead quality and follow-up, impacting revenue.

## SOLUTION

DemandGen's comprehensive approach incorporates marketing and sales alignment as well as lead scoring that moves prospects through the funnel using activity triggers.

## RESULTS

ROI in marketing effectiveness, revenue generation, and rapport with Sales improved significantly, and the program was honored with major marketing awards.

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– Greg Forrest, Sr. Director of Marketing Operations & Demand Central, Concur



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on KPI triggers. As this approach represented a significant change in process, sales and marketing needed specific education to fully understand new nurturing tactics and lead scoring methods, and to raise enthusiasm and motivate adoption.

## SOLUTION

To address these shared sales and marketing goals, Concur engaged with marketing automation consultancy DemandGen International to develop a comprehensive plan to organize marketing and sales tasks more clearly and efficiently, and to deploy a lead scoring model that would better characterize lead types.

Concur also sought to develop engaging and educational nurturing content that would appeal to target audiences' pain points and, in turn, guide them through the sales funnel. Before implementing any solutions, however, DemandGen recommended that the first priority be extensively educating sales and marketing personnel on the new processes and how the two teams would work together in the future.

"When we first met with the Concur marketing team, we discussed their alignment between the sales and marketing teams," said David Lewis, CEO of DemandGen International. "The conversations focused on gaining an understanding of the quantity and quality of leads, how the systems were set up to enable marketing to pass leads to sales, and what sales was doing with the leads that were being passed to them."

Lewis explained the results of DemandGen's analysis. The team found room to improve the systems that passed leads to sales, and determined that a common language was needed to describe each stage of the sales funnel as well as how leads would be handled at each stage.

At the beginning of the alignment process, DemandGen helped Concur implement a variation of the Sirius Decisions Demand Funnel Taxonomy for its lead nurturing and scoring model. Based on individual KPI triggers that push leads through three stages—the suspect stage, the inquiry stage, and the MDR-working stage—this taxonomy enables sales and marketing organizations to "speak the same language" and create a model for reporting on pipeline velocity.

Before adopting the new taxonomy, however, Concur and DemandGen made company education and training a priority to guarantee optimal implementation: scheduling a series of workshops so that the sales, marketing, and operations teams could define and agree on process stages and lead taxonomy.

### The Roll-Out

Once a common language was established to help categorize each stage of the funnel, the new lead scoring system was designed and implemented.

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By integrating Eloqua and Salesforce.com, Concur was able to align its sales and marketing teams by developing a new lead scoring model that would effectively measure definitive interest of a lead. As a result, the company could direct attention towards hot leads instead of focusing on false positives.

“If marketing is doing its job well, it produces a steady flow of leads for the sales team,” Lewis said. “But because of the various tactics that marketing uses to capture leads, some leads are simply more qualified than others. Depending on the call-to-action for a campaign or the type of content being used, it’s quite common that marketing generates a fair number of leads that aren’t even leads at all, but rather are people who are interested in the particular item or content being promoted by marketing. The approach we use surfaces leads who align to their customer profiles and have a high level of interest.”

Concur’s new scoring and prioritization method is based on two key dimensions: qualification level and interest level. Qualification level measures a lead’s fit based on factors like title and industry, which the lead provides by filling out a form. Interest level tracks and analyzes “digital body language” through web site visitation, download activity, and what forms are being filled out, among other online factors. The intersection of the two scores determines a lead’s rating. Lewis explained that this new method improves efficiencies and increases the quality of leads that are being pushed to sales.

“By using these two dimensions together to form an overall lead rating, we are able to take complex algorithms and produce a very simple A through E rating system to present to sales within the CRM,” Lewis said. “If the system didn’t incorporate these two dimensions, and measured on interest alone, a number of false positives would be produced. By incorporating the fit criteria we’re able to show sales how well a lead meets the ideal customer profile, as well as how interested they are. In our experience, lead scoring systems that incorporate these two dimensions are the most effective predictors of the likelihood that a prospect will be converted to a sales opportunity.”

With the new rating process, Concur sifted through more than 1,000 database contacts and implemented a rating system of one to five stars—similar to ones seen in movie reviews—to determine overall interest level and sales readiness. The team also implemented a coaching and assessment training program to improve sales and marketing knowledge of the terms and values used in the Salesforce.com CRM system.

Because Concur’s sales model incorporates contact by a market development representative, DemandGen adapted the Sirius Decisions Demand Funnel Taxonomy for a new lead nurturing strategy that addresses the top three stages of the funnel.

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1. **The Suspect Stage:** Indicates leads who are from a list upload and may or may not know Concur.
2. **The Inquiry Stage:** Nurtures inquiries to further qualify a lead and build more interest.
3. **The MDR-Working Stage:** Utilizes a nurturing function designed to develop a connection between the lead and market development representative (MDR).

“These tightly integrated nurtures enable a lead to pass systematically from stage to stage, depending on the lead score and when the market development rep takes ownership of the lead,” Lewis said. “From a reporting and analytics perspective, the volume and velocity of each stage of the funnel is measured against benchmarks to ensure not only that the system is doing its job but also that sales and marketing are adhering to the defined process.”

DemandGen provided Concur with the necessary guidelines and resources to develop compelling nurturing content to improve engagement and overall communication with leads.

“From all the research that we’ve done on lead communication, we’ve determined that content that is role-based as well as industry-related is the most effective,” Lewis explained. “It would be nearly impossible to create nurture content for each and every industry that Concur targets, so we identified the most common industries and developed content for those. Because we also capture the person’s role during form submission, we’re able to use these two dimensions in the content to create the highest form of one-to-one marketing.

We find that many clients are not used to writing the short nurture content which performs best—probably a legacy from creating printed materials—so creating the content plan was helpful in getting the team thinking about new forms of content development.”

## The Results

The return on investment has been immediate in terms of marketing effectiveness, revenue generation, and even rapport with sales. Forrester revealed that during the first month the new lead management system was implemented, each team in the North America Business Unit was poised to hit its Q3 segment number. Through the MDR-Working nurture program, the company hit a record week of attendees for the North America weekly webinar. The company also rolled out a Free Trial Nurture program for Concur Breeze that increased Usage to Purchased conversion rate by 20% and maximized sales rep efficiencies.

By implementing best practices, such as creating short yet effective content, DemandGen helped Concur develop email assets for a variety of nurtures. With guidance from a nurturing flow diagram to show a specific lead path, Concur could clearly define nurturing tracks for each of the key industries and roles of its target audience. Leads can now flow down the appropriate path based on their profiles and in turn, receive the relevant content that truly speaks to their pain points and specific industries. If a lead isn’t responsive to sales communication, it is recycled back to marketing to continue the education process.

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Concur was named a winner in DemandGen Report's 2011 Sales & Marketing Alignment Awards for the increased education and collaboration among its teams. 3 Concur also went on to win the 2011 "One View of The Truth" Eloqua Markie Award for its ability to show marketing's contribution to pipeline. By partnering with DemandGen International, Concur has ensured that sales can now view marketing's communication with prospects and can distinguish when to reach out to prospect in the nurturing program. This new easy-to-see scoring process is updated in real time, so both teams can easily track lead status and progress, and campaign efficiency. These policy changes have allowed Concur's teams to further productivity and increase overall revenue.

"The whole process has engaged sales and marketing to produce an integrated sales and marketing process that is the product of both teams," said Forrest. "The roll-out and understanding, and everyone talking the same language, have brought another level of synergy to our organization. We just produced July's sales and marketing funnel metrics that have been honed to an automated process. The report produces actionable metrics that both teams can use together to improve revenue development."

The journey isn't over for Concur. The company is continuing to work towards optimizing sales and marketing alignment through the methods developed by DemandGen International. "More revenue performance management reporting is being developed and our Demand Funnel metrics will be key to predict velocity and the forecast of our pipeline," Forrest noted.

"We will continue to hone the process so the adoption rate is as high as possible, and so marketing and sales can continue to understand each other better—it's never over."

Forrest revealed that Concur is developing more core demand generation programs to automate additional parts of the funnel. The company's Closed Not Won automated nurture program recently launched, and Recycled nurturing is also being implemented.

"I continue to recommend DemandGen International to other companies," Forrest said. "DemandGen has the business acumen to help with the sales and marketing process and alignment, and also has a very high level of technical ability to apply the science in order to execute. They aren't afraid with their recommendations, and they make sure the wings won't fly off your plane."

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