



[how to generate leads online.](#)

\*this is a study guide that was created from lecture videos and is used to help you gain an understanding of how to generate leads online.

## Lead Generation Fundamentals

Write (SMART) *business goals* as first step

*KPI* are specific for your lead generation program

Web KPI: Unique v returning, page views, downloads, contact information

Social Media KPI: followers, shared info, click through-rate

Search KPI: Page rank, viewers

Email KPI: Click through rates, unsubscribers, shared content

Tools: Vertical response, mail chimp, constant contact

*Benchmarking*: Understanding where you stand

“What’s successful?”

Entice your prospects

Know your customer: demographics, think from your customers perspective



Buying steps: Consideration -> Evaluation -> Purchase -> Experience

From KPI's determine what types and how you should create content

*Content Audit:* What do you have? How can you reuse it? How can you curate it?

Character Count: Twitter-100, Facebook/Email Subject Line-40

Channel Selections: Focus on your customer and publish and be present where they are

How often should you publish? Write in depth content, repurpose content, ask customers how often they want content

## *SEO*

Search Results: relevant, credible, quality links

Descriptive, concise and accurate keywords

Choose primary keyword for each landing page

Clear concise and understandable content

## *Website*

Homepage: What you do, what makes you different/better purpose, how you help customers



Easily be able to navigate through site

Unify your brand, use visuals

*Convert prospects to qualified leads*

After developing leads, create a compelling offer. Get their attention, solve their problem, engage customers, establish credibility and create trust

*Call to Action*-easy to find, bold colors, place above the fold, brief action oriented words, “use first person language” my instead of yours

Create effective *landing page*, create an *effective form* to get information from customers

Create a *database*

Define your criteria for leads so you can increase or decrease your *lead response rate*

To narrow your leads-charge fee for offer, request more info on contact form, strict terms and conditions

To broaden your leads-offer free service.gift/tool kit, use loose terms/conditions

Set up Google Alerts to track and monitor keywords

Transform Leads to Customers



Lead scoring is when a lead is ready to buy

Dynamic content. Ex. personalized email

Clear, concise and consistent email subject line. Grab readers attention, subject line should be accurate, useful, clear, specific, sense of urgency and 30-40 words.

*Create a positive online shopping experience to reduce shopping cart abandonment*

provide a guest checkout, ask for shipping before billing, offer full range of payment options, make checkout link easy to find, provide consistent branding, offer multiple shipping options, provide delivery estimate, be transparent about return policy, send confirmation email and say thank you

*Improve customer experience*

Live chat feedback form, email address or phone number for customers to contact you about problems

Monitor your social media channels as it can detract your business in reputation.

Become a customer of your competition to get inside and know how to adjust your company.

Rewards club, exclusivity, "surprise and delight" such as providing a free appetizer to a customer who provided a good review

*Engaging with customers*



Twitter to promote local cause that relates to business

Join professional network on linkedin

Ask facebook followers for ideas for new products or way to improve your service

Join conversations of instagram activity

*Create loyal advocates*

Tailor content for sharing, use visuals that are interesting and easy to share, build relationships with social media influencers

Referrals, consumer online opinions and editorial content are most trusted forms of marketing

Send coupon codes, give reward points for writing reviews, leverage employees on how to obtain referrals by year end bonus, recognition, gift cards..

If you need more information on the [basics of lead generation](#) then visit HubSpot.

### [Advanced Lead Generation](#)

Sales funnel- how your company defines each stage in your revenue cycle

Drive leads into your sales funnel

Lead is individual that is a good fit for your product



Not everyone that comes to your site is a good lead

A good lead is a qualified prospect that exhibit buying behavior

Elements of a lead is demographic (company, title, location, industry, company size, products sold) engagement (website activity, download history, event attendance, discussions with sales, program activity) intent (online activity, engagement with competitors)

BANT is how you determine if a good lead- budget, authority, need, time

Leads buying journey should map to your sales funnel

What marketing program you run depends on where a lead is in your sales funnel

Your sales funnel also determines when you hand a lead off to sales

### *Sales Funnel*

TOFU Top of Funnel (knows about company, not ready to buy

Communication that is educational)

Enters funnel as Name -> Engaged -> Prospect

MOFU sales intent (have engaged and person is potentially good sales lead, communication is product education) Lead- viable lead sent to inside sales to ensure they are a good lead, this is when they are a Marketing Qualified Lead -> Sales Lead- stage in which lead is sent to



account executive to schedule meeting and convert to...

\*Recycling in MOFU if a lead is not ready to buy, send back to marketing for more lead nurturing and programs (automated drip campaigns)

BOFU lead is close to being a customer and actively talking to sale, communication is showing product value) Opportunity- viable sales opportunity and being worked on by sales -> Opportunity stages- ex. Demo, negotiations, contract.. -> Customer- closed-won customers and the endgame!

### *Lead Hand Off Rules*

Create who communicates to a lead when and when do you hand off to the next group, marketing and sales must be best buddies, handoff must be seamless, happens between an MQL (good lead by marketing, good fit and engagement, BANT qualified) and an

SQL (had had direct contact with sales, sales determined is good lead and ready to make an opp)

MQL threshold- a lead passed to sales should have a combination of fit and behavior called a lead score

Lead scores can be comprised of demographic, attributes, engagement, and predictive indicators (numerical score from 1 to 100)

A scored lead is a warm lead



Sales notification needs to happen that lead is ready to be contacted, notified once hits the MQL threshold, need a service level agreement between sales and marketing, which is an agreement that define these specific timeframes in which a sales rep must follow up with an MQL, Implementing an SLA ensures smooth handoff and follow-up, notifications should be sent via email to the sales rep, then his boss, then the VP, and so on until the lead is followed up with You need a strong sales and marketing handoff so you don't have a leaky funnel

Define your key metrics and goals, a lead gen plan does not stop after lead acquisition.

Benchmarks- Determine where you are today to be able to set your goals properly, ex.  
Current leads, MQLs and opportunities generated per month

### *Lead Generation Goals*

More high quality leads

Moving leads faster through the pipeline

Improving branding to supercharge inbound

Improving sales and marketing alignment and communication

Increasing close rate and deal amount

### *Common Lead Generation Metrics*

Number of leads generated, number of MQLs generated, and number of opps generated,



conversion rates per program, conversion rates per funnel stage, cost per lead, cost per MQL, cost per opp, lead conversion velocity, marketing attribution and bookings

### *Set Yourself Up For Measurement Success*

Track your important metrics(above) in a spreadsheet per program, per month, and per quarter

Use an attribution platform that helps track marketing success

Set up a biweekly or monthly metrics meeting with your team and sales

Create reports for your teams and executive reports to bubble up status of your programs,

### *Lead Based Marketing*

strategy that places the focus on driving demand with an individual

PRO: Most marketing and sales systems are lead based, easier to scale, can focus on 1:1 personalization and selling, inbound is lead based, works well if you focus on small and mid-market

CON: focus on lead quantity over quality, can cause sales and marketing misalignment, doesn't account for decision groups/account influencers, can cause overspending by casting wide net to get leads into sales funnel

Lead Gen- Offer -> Channels -> Segments



### *Stages for Lead Gen*

Full funnel content

Multiple inbound and outbound programs

Full funnel, multichannel nurture to move inbound leads

Lead handoff rules

Sales enablement- sales understands and well aware where leads are coming from

VS

### *Account-Based Marketing*

a strategy that focuses on driving demand by marketing to a targeted account

PRO: b2b companies sell to accounts not individuals, sales focuses on selling into accounts, sell to only the accounts that are a good fit for your company

CON: difficult to scale, challenging if you sell to smaller companies or mid market, need to agree on a solid list of target accounts, requires budget for targeted field marketing

ABM- Accounts ->Content -> Channels

### *Stages for ABM*

Account Selection

Contact appending

Account Based Content

Personalized outbound programs- personalized direct mail, field events, email programs



Strong sales and marketing alignment

*Lead Generation Plan/Roadmap*

Prioritize your objectives

What are my marketing objectives for the next year?

Where do I think I have gaps in my current marketing mix?

What are the new channels I have been dying to try?

What is my budget?

*Top Lead Generation Objectives*

Generating awareness

Acquiring prospects

Nurturing prospects

Qualifying sales readiness

*Pinpoint focus area for lead generation efforts*

Do we struggle driving inbound awareness for the company?

Do we struggle getting prospects to enter our sales funnel?



Do we struggle moving prospects through our sales funnel?

Do we struggle delivering high quality leads to sales?

The objectives you prioritize will help your channel mix

*Document objectives and goals*

Channels

Program tactics and proposed calls to action

Expected vs. actual leads

Expected vs. actual MQLs

[Inbound Marketing for Lead Generation](#)

*Content Marketing Tips*

Create high value content to fuel all of your lead gen campaigns, needs to attract leads

Embodies the product or firms core brand elements

Use variety of media formats such as text, video, photos, audio, infographics to tell story

Can be consumed by variety of devices such as desktop, computers, smartphones and tablets



Distributed through brand owned properties, social media and third party vendors

Provides measurable results through use of call to actions

Helps with branding preference and drives purchases

Is the fuel for all your lead gen programs

Builds prospect and customer loyalty

Positions a brand to be a thought leader in their space

Helps with SEO and social validation

Focus on thought leadership over hard selling

Create it to be highly visual

Keep an updated editorial calendar of publishing dates

Provide messaging documents with key messaging, personas and buying stages

Thought leadership- ideas that require attention and offer guidance/clarity on topic, educational, customer first, provides actionable insights, useful beyond the product

VS.



Promotional- Sales oriented, company first, provides detail about the product,

### *Types of Content*

Articles, Blogs, Case Studies, Cheat Sheets, Ebook, Infographics, Websites, Podcasts, Reports, Slideshows, Surveys, Templates, Videos, Webinars

### *Website Tips*

Usability and design- reflect brand, visually appealing, mobile responsive, not text heavy (concise sentences, bullet points) easy to navigate, have clear conversion paths,

Website forms- short forms are better, first name-last name-email-work

Website CTA- contact us, demo request, content download, chat, subscription request, benchmark grader, product trial, contest

Website Testing- AB Testing (examples to test: image selection, CTA placement/color, website copy, website navigation) chose one element/variable to test at a time, create hypothesis, split web traffic 50/50, benchmark your original version, wait until test reaches full significance

### *Blog Tips*

Attract new buyers at the top of your sales funnel

Helps generate leads search or social media, show your personality!



Make blog visual, have clear conversion goals, have multiple paths to social media, offer pre-populated tweets, provide mobile optimized experience,

### *Social Media Tips*

High value and compelling educational offer, interesting copy with cta and eye catching visual, a form to collect lead info, combination of organic and paid efforts

Need paid ads for social media to expand your network

### *What motivates people to share*

To enhance their own reputation

Provide value to them

Individual feels a sense of exclusivity

Competitions and contests

Altruism

### *Facebook Perfect Post*

Compelling Copy

Eye catching imagery



A CTA and link to a compelling offer

Shareability

Personality

*What to Promote on Facebook?*

Content assets gated to a form

Event registration forms

Videos

Infographics

Blog posts (put paid advertising behind it)

*Twitter*

Foster continuous and real time relationships, can post wide variety of content often.

4-1-1 is 4 educational tweets, retweet 1 industry influencer and then 1 promotional

Twitter Perfect Tweet-

Compelling copy, clear CTA, good hashtag usage



Twitter Lead Gen Card, basic tweet with image and link

### *LinkedIn*

People can go on LinkedIn to talk business and get industry news

LinkedIn Perfect Post-

Clever copy, a clear CTA with link, professional imagery, educational content

LinkedIn Ad Targeting- use for target account ads or general targeting

LinkedIn Sponsored Updates- post on own feed to increase impressions

LinkedIn Ads-

LinkedIn Sponsored InMail- send from own linkedin, paying to send directly to inbox, use sparingly with high value offer

### *SEO Tips*

Don't keyword stuff, What does my company do? What are the key search terms? What are my different products/services and what needs do they fill? What keywords do my competitors rank for? What is the traffic opportunity for each keyword? Have your page and keyword answer a question

### *Influencer Marketing Tips*



Increase inbound traffic, great for brand awareness, build inbound links, shows you are thought leader, generates leads and increases referrals

Influencer is a thought leader, high volume of social followers, author/speaker/blogger, award winner, analyst. Needs to be balance of giving and taking for influencer

Create influencer list (research through SM, use influencer software tool, search for authors on industry) -> Tier list on importance and how to contact them -> Create outreach plan (reach out through SM, send email offering something of value, send direct mail, show them love with content) -> ask them to do content share/blog post/podcast/speak at event

To further [learn the foundations of inbound marketing](#) visit Marketo.

## Outbound Marketing for Lead Generation

### *Paid Ad Tips*

Define your goals

Determine your budget

Define your audience

Choose your Keywords

All PPC ads should go to a landing page with an offer

Landing page should speak to your exact ad offer



If landing page doesn't speak to your ad, your lead will bounce

Landing Page best practices- engaging graphics, bullet points, clear CTA, validation

Ad Copy- use clear easy to use words

Use vivid emotional language

Focus on keywords and intent behind them

Have clear and compelling CTA

80% of people will only read your ad headline, focus on keyword, use strong verbiage and play to emotion

Ad Copy must show value, don't shy away from all caps bold letters and exclamation points!

Tracking Ad Performance- Impressions (based from keyword, budget Google Quality Score)

Clicks, Conversions, CTR, CPC, Funnel Performance.

Google Quality Score is expected keyword CTR, historical CTR, Account history, keyword/search relevance, keyword/ad relevance, ad performance

### *In Person Events*

Physical Events- tradeshows, conferences, field events



Set goals, develop your trade show presence (swag, welcome area, colors, new products)

### *Virtual Events*

Webinar- can happen real time or on demand, 30-60 minutes, slide presentation

1-2 a month, choose webinar platform, create webinar calendar, get speakers, decide your topic, know your audience, keep it entertaining, use imagery, don't make slides wordy, include twitter handle and tweetables, create landing page that hosts your webinar content with form, email link to webinar recording to all registrants, add to email nurturing program, create ebook out of webinars, sponsor a paid or virtual webinar, be a speaker for partner webinar, speaker for customer webinar

### *Pre-Event Promotion*

Remember email is your number one event, always promote on social, leverage sales to do outreach, direct mail if large tradeshow, paid promotions, leverage partners, create a microsite if large event, be active on social channels while at event, daily live blogs during event, send out daily emails, write and schedule event followups before the event, send follow up email 1-2 days after event, send valuable content from event, include additional offer for people to engage, add to email nurturing track

### *Email Marketing*

Transactional Emails- Emails related to event

Promotional- emails meant to incite action like a demo or a download



Relationship bidding- emails meant to solidify relationships with your database

Communication- Emails that communicate some sort of information

Don't blindly batch and blast your emails

Email segmentation based on demographic: company size, title, location, age, income

Based on Buying cycle: where a lead is in her buying journey

Behavioral: what a lead has done and how she has interacted with your brand

*Write compelling subject line*- ask audience question in subject line, use a list, offer a discount, say something controversial or attention grabbing, be personalized, reference pop culture

*Create copy that converts*- make it concise, use bullet points or number lists, always have a clear CTA, use video and other media, A/B Test different copy to see what works,

*Make it visual*-make sure emails are on brand, add compelling email banner, add a hero image, add video, photos or other multimedia, make sure it's mobile friendly

*Calls to Action is critical*- Have only one CTA per email (two MAX) place CTA above and below the fold, Make CTA stands out through copy and color, make sure CTA is obvious and concise

*Sponsored Emails*



Leverage someone else's database to partner and gain trust from their buyers

Email buyout- you purchase full email send to a certain number of contacts. Email is 100% dedicated to your brand and often links out to your own landing page.

Newsletter Spot- Purchase an ad or a content spot on the vendors newsletter. You share this space with a few other companies and your ad

You can select the audience specifications for your email send.

Pricing is though list, CPL, newsletter topic, bundle pricing

Vendor considerations- Always use trusted vendor, list quality and update frequency, duplicate lead policy, data transfer capabilities

### *Content Syndication*

Use another vendors audience to promote your content on their website

Builds brand trust and visibility

Builds inbound link profile

Determine your goal to determine content syndication

Target prospects by location, job titles, company size, industry



Choose offer based on vendors audience

Content asset: Does early or mid stage content work better?

Content types: Which type of content performs best?

Vendor: What vendor delivers you the best leads?

Form length: Test different lengths

CTA: What is your CTA? What works best for this audience?

### *Direct Mail*

*Best Practices* Stand out and engage with something a customer can see and feel, think dimensional

Dimensional, Personalized, High-end, Creative, Targeted, Unique, On-brand, Trackable

*Use* for door openers, deal accelerators, target account engagement, new customer engagement, event invites, executive introductions.

*Tips* Make sure direct mail is trackable, Do not make it a marketing activity only

*Process* Send direct mail- send email follow up once delivered- have sales rep call- reach out through social media- send email with high value content



## Testing and Optimizing Lead Generation Programs

### *Testing*

You can test- programs, vendor, email subject line, email copy, CTA, Design, Website navigation, Form lengths, SM messaging/copy, Content, Time of Postings

### *A/B or Split Testing*

50/50 send or traffic split is how you determine success, only looking at 2 elements

### *Multivariate Testing*

Should use software solution to build. Can be complicated

Setting up your Test: Formulate question Define Success -> Construct hypothesis -> Isolate your variable -> Use a large enough sample size -> Eliminate confounding variables -> Look at Results

### *Measurement*

C suite: high level overall marketing contribution

Marketing leadership: Channel performance and ROI

Program managers: Program performance and ROI

First touch attribution- leads, opportunities, and deals sourced by marketing. "Marketing



brought the lead into your system.”

Multitouch Attribution- marketing impact on all leads, opportunities and deals. Shows how marketing influences accounts throughout the entire buying journey.

### *Marketing Attribution Reporting*

Demand waterfall shows: what marketing is generating each quarter, how leads move through your funnel, lead quality, sales and marketing alignment, deal close rate and funnel health

### *Channel Metrics*

Revenue percentage by Channel

First touch attribution

Multitouch attribution

Leads, MQLs, opps, and deals sourced

Touched deals

Velocity: lead to opp, lead to deal

ROI for the channel



### *Path to Sale*

How many marketing activities are required to win a deal?

And does that differ per channel?

Visit Optimizely for [tips on how to optimize lead generation](#).

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