MADISON LOGIC

BLUEPRINT

Convert to Conversations:

How to Turn Leads into Sales Meetings

Accept it: Just because you've received an inbound lead doesn't mean they're ready to speak to your sales team.

Generating that initial interest is step one in your marketing strategy—and while lead-generating campaigns are an important component, you'll only find success if you know how to urge leads to request a demo or meet with a sales representative.

Leads may be hesitant to move forward because they:

- may not know they have a business problem yet—and without that sense of urgency to solve a business concern they haven't identified, they won't respond to outreach from sales.
- don't have enough information to trust your brand or platform yet. Too early sales outreach makes it seem like you're rushing the process it takes to warm a lead up toward seeing the value your product or service has to offer.
- have too much information from you and competitors, which is overwhelming and stalls buying decisions all together.
- may no longer be a stakeholder or decision-maker for that company due to organizational structure changes or leaving that position entirely.

Generating enough interest to drive sales engagement comes down to how well you:

- demonstrate that you understand the buyer's concerns.
- create a sense of urgency around solving their concerns.
- separate your product or service from competitors.
- understand their buying behaviors and your sales cycle.

67% of decision-makers want more communication and reassurance when making a decision.

When you focus on *why* leads come to you in the first place, you'll not only have more success staying top of mind as they evaluate solutions and capitalizing on their readiness to buy—you'll give them the attention and personalization they require to empower them to schedule a meeting with a sales representative, which accelerates the buying journey at scale and has a greater impact on overall company performance.

Wish you had a step-by-step guide to help you understand how to advance your leads into sales-ready prospects? Well now you do!

This blueprint breaks down the five steps that not only help you develop a strong, repeatable approach to your campaign strategies, but also motivate your leads to schedule and take those worthwhile sales meetings. Use it as a guide to evaluate your current workflow or identify areas where you can level up.

Don't worry, with our help they'll be calling you a marketing rockstar in no time.

How It Works

- Align Your Strategy to Your Data
- Align Your Content & Messaging Strategy
- Surround Leads Through a Multi-Channel Approach
- Cross-Collaborate with Sales
- Measure and Optimize Your Campaigns Toward Success

Step One: Align Your Strategy to Your Data

The key to good campaigns is good data. But the key to moving quality leads through your sales funnel lies in *how* you interpret your data.

Well-maintained data flows from your ability to gather the necessary insights into your leads, which allows you to be more strategic when developing your lead-to-appointment strategy. Here's how you can leverage your data to be more effective in guiding leads toward sales engagement.

Segment Your Leads with a Variety of Data

Your lead's demographics (job title, age, etc.), technographic data (software applications, cloud service, etc.), and firmographic data (industry type, company size, annual revenue, etc.) play a major role in how you want to segment your leads for a nurture strategy. Segmenting your lists around what will entice leads to meet with your sales team (such as relevancy, timeliness, and personalization) demonstrates that you understand their motivations and business concerns.

Relevancy

Does this lead fit your ICP? If not, use a separate nurture strategy as a way to strengthen your position as a thought leader in your industry. If the lead isn't a good fit now, they may be later, so don't discard them entirely.

Timeliness

Develop your targeting strategy based on the level of intent and funnel-stage of content consumed.

Personalization

Bucket your audience out by demographic data to build trust and demonstrate that you understand their unique buying needs.

Focus Bucketing Leads Around Intent and Engagement

Just because a dozen leads came in through the same piece of content doesn't mean they should all be treated the same way. How a senior member of the buying committee looks at content is completely different from how an end-user—the person using your product and solution daily—might.

Focus your segmenting efforts and advertising spend on the members of the buying committee who are most engaged with your content and who will be taking the first initial meeting. The inbound leads are likely the ones who are your champions to secure the call. If budgeting is tight, concentrate your campaign efforts on these inbound personas.

Demographic data	Behavioral data	Intent data	Internal data
Prospect's role, seniority, buying committee status	How the lead came to you in the first place	Helps determine whether your lead is in-market vs. out of market	Data from your internal source systems, such as your sales cycle length
Company industry	Net-new vs. past engagement	Industry trends	Market maturity
Size of the business	Content type preferences	Other relevant topics that trigger intent	Similar customer behaviors

While not every buying committee member will be on the first call (or potentially any call), it's still important to consider what assets you have that will generate a sense of urgency and demonstrate that you understand what their problems are and how you are the most viable solution.

80% of consumers are more likely to make a purchase with brands that offer personalized experiences.

Leverage an Effective Lead Scoring Model

Leverage an effective lead scoring model, and tailor it for the type of content and topic that brought them in. If your inbound lead came from an educational webinar, you'll want to start nurturing them through top of funnel (TOFU) content. If the lead came in from a case study, they're likely warmer and are prime for middle of funnel (MOFU) content. If you're getting multiple leads from a high-priority account, include that referral as a metric in your scoring model. And don't miss an opportunity to strike on a hot lead—that momentum benefits other sales funnel metrics, like customer acquisition cost (CAC) and sales velocity.

Observe Your Lead's Engagement with Competitors

Observe engagement patterns from competing solutions and factor in buying cycles and trends for the industry. If you know a lead is engaging with bottom of funnel (BOFU) content from a competitor, it's important to shift their position within your funnel. Look at your lead's technographic data to figure out what past tech stacks looked like, then drill down into finding out their average buying cycle lengths to gain a clear picture of when your leads will be ready to make a purchase. Quickly figure out how to gain a competitive edge against the other solutions on your lead's list and serve them content that will entice them to contact your sales team.

How Madison Logic Does It

Before we segment and score our leads, we look back at our targeting strategy and see what the lead's declared intent is and what content drew them in. We then bucket leads around who is in- and out-of-market, which also serves as our baseline for lead scoring. From there, we segment our lists by buyer persona, which allows us to understand who our leads are, what they're looking for, and what nurture path to set them up on to move them successfully through our sales funnel.

Step One Self-Assessment

- [ ] Are you clear on your audience's intent (their "why")?
- [ ] Do you have a sense of your lead's demographics? What about their firmographic and technographic data?
- [ ] Do you factor content engagement into your lead scoring system?
- [ ] Is content organized by funnel stage (TOFU, MOFU, BOFU)?
- [ ] Are you tracking your leads' engagement with competitors?

LEVEL 1

Treating all inbound leads the same way, without using data to score accounts.

LEVEL 2

Scoring model in place based around internal data only.

LEVEL 3

Leveraging both internal data and external data sources to create highly segmented audiences.

Step Two: Align Your Content & Messaging Strategy

Your lead is in your funnel—now it's time to create a sense of urgency that gets them to speak to a sales team member. The way to do that is through your content and messaging.

More buyers are conducting their own research, resulting in a reduction in interactions with sales. With Gartner data indicating that sales reps have roughly 5% of a customer's time during their B2B buying journey, it's up to the marketing team to provide content and messaging that gets buyers to realize not only what a viable solution looks like, but that you know them and their intent—their "why"—for looking up your product in the first place. Your content and messaging must not only show your expertise in the industry—it needs to create a sense of urgency toward seeing the product or service in action, which buyers can quickly witness with a demo request or conversation.

Empower Your Leads with Education

As a marketer, your goal is to empower leads throughout their independent-buying journey. When a lead downloads a single piece of content, they're just becoming acquainted with your brand and solution—particularly if it's TOFU content like an infographic. Don't jump directly into what your company offers—start with what problem your company solves for them, and offer education that helps them make an informed decision. Put your lead's search for answers and information at the center of all your content communication, rather than your business or brand. If they find your content helpful, they're more likely to speak with you.

Focus on Building Brand Value and Trust

Leads are more than just a means to your bottom-line numbers—they're people looking for solutions. Use your content and messaging to create a positive experience, especially if they're engaging with TOFU or MOFU content. When your messaging reaches a lead at the right moment with the right information and insight, it feels like you know exactly what they're looking for—which establishes a deeper sense of trust.

Appeal to Your Leads' Emotions

While your intent data reveals your audience's behaviors, a lead is still likely downloading plenty of assets—potentially at the same time, and especially if they're in the discovery and research phase of their buyer's journey. Your content needs to stand out—and you can get there by appealing to your leads' emotions.

People remember how they feel as they read ("Wow, that was really insightful!" or "I learned something!") versus the details of what they read. If you create an emotional bond with your lead, you continue to set a strong foundation to establish trust between your company and the lead, so they'll be more inclined to hop on the phone with your sales team.

Personalize Content to the Buyer Persona

The person most likely to take the first sales call is the end user, who will benefit most from using your product or service in their everyday workflows. That said, the end user isn't the only person making a buying decision. They're part of a group of buyers—an account—who have different concerns and questions when it comes to buying new software or products. Because of these various concerns, you need to customize your content to address the specific concerns of each persona.

Persona	End User	Technical Buyer	Decision-Maker
Main Concerns	• Functionality • Ease of use	• Tech stack fit • Support needed • Integrations	• Cost • ROI

What matters to an executive may not matter to an end user, so create separate campaigns for each persona as opposed to treating the entire account the same way. Even if the inbound leads came from the same piece of content, they're likely considering the content and messaging in different ways—ways that are unique to their roles within the company.

Anticipate Buying Committee Members Not on Your Radar

You're looking to not just nurture the lead—you want to nurture the full buying committee. Content needs to speak to buying-committee members you're unaware of—the ones who haven't submitted a form for content, but may be getting links and intel from the person who is advocating for your product.

Remember: While content ideally educates, motivates, and persuades readers to meet with your sales team, you still need to anticipate any blockers. When you have a clearer sense of who else is part of the buying committee, you are more likely to target blockers and product champions at a granular level with content and messaging that addresses their concerns.

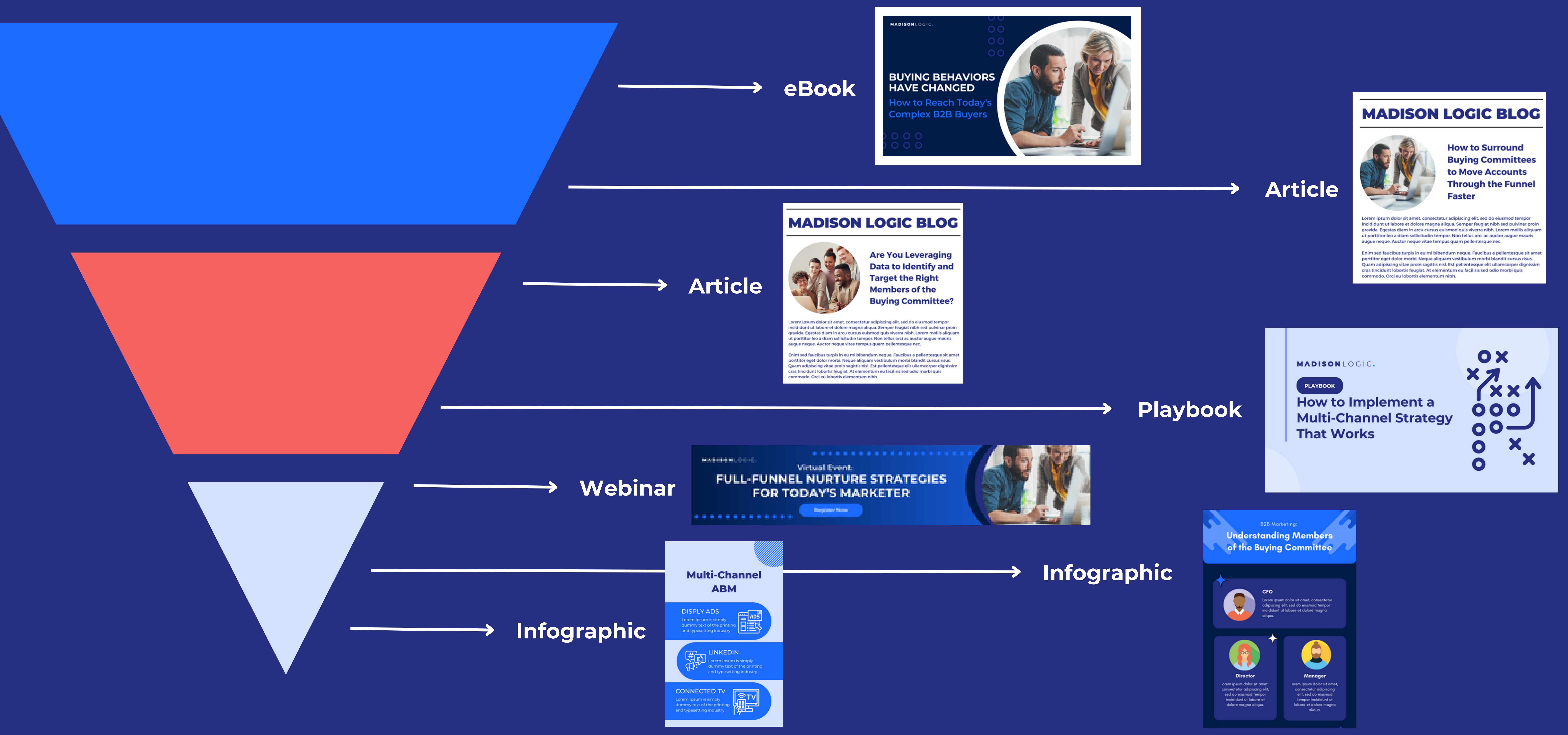
Persona	End User	Technical Buyer	Decision-Maker
Type of Content	• How-to guides • Educational webinars • Playbooks	• Interactive product videos • Implementation content	• ROI calculators • Social proof • Testimonials

According to Gartner, the typical buying committee for a complex B2B solution consists of six to ten decision-makers, each armed with their own set of four or five independently gathered pieces of information to the table.

How Madison Logic Does It

When developing content that we want to promote through content syndication programs, we start with our overall message and theme, then break our content out by audience and type. This allows us to develop relevant content to repurpose along the lead's buying journey. And by starting with a single theme, we build lead nurture paths at scale and with ease to ensure we can assign our leads to an appropriate path that continues to push them through the funnel.

OVERALL NARRATIVE: MULTI-CHANNEL ABM IS A CRUCIAL B2B MARKETING STRATEGY



Step Two Self-Assessment

- [ ] How does your content address your leads' needs?
- [ ] How does your content address any blockers?
- [ ] How does content align with your core messaging?
- [ ] Have you organized and assigned content to specific funnel stages?
- [ ] Have you organized and assigned content according to persona?
- [ ] Have you considered what content formats work best for each persona and funnel stage?
- [ ] Do you have content organized around demand creation and demand capture?

LEVEL 1

All active campaigns use the same follow-up messaging.

LEVEL 2

Active campaigns adjust messaging based on funnel stage only.

LEVEL 3

Active campaigns adjust messaging and content delivery based on funnel stage, persona level, and internal & external data.

Step Three: Surround Accounts Through a Multi-Channel Approach

You've successfully targeted your leads with the content they want to read—now, it's time to get in front of them and remain top of mind. If you're only using a single channel to nurture these leads, you end up missing out on crucial opportunities to strike. Think about all the advertising and marketing channels available to you and start to put them together in a cohesive way so you can shorten the timeframe from qualified lead to initial sales meeting.

Align Channels with Personas and Funnel Stages

Members of the buying committee spend their time across a variety of channels—and you want to catch them with the right information at the right time, wherever they are. Just as you align content themes to personas and funnel stages, you need to align your promotional channels to them as well.

Think about where each member of the buying committee spends their time. Then, coordinate those channels accordingly.

Type of Lead	TOFU Leads	MOFU Leads	BOFU Leads
Channels	• Connected TV (CTV) • Display advertising • Email nurtures	• Content syndication • Display retargeting • LinkedIn retargeting • Email nurtures	• LinkedIn retargeting • Display retargeting • Content syndication • Email nurtures • Sales outreach

An additional layer to implement on campaigns with the most success possible is to consider demand creation and demand capture, and what channels work best. If you're looking to nurture out-of-market leads and create demand, a slow drip email campaign builds trust and provides ample opportunity to stay top of mind. A multi-channel strategy with all available channels keeps your messaging and content front and center to capture that demand—and eventually push toward a meeting.

Match Channels with What You're Looking to Achieve

When you‘re developing your multi-channel strategy, consider how each channel can help you continue your lead-to-sales campaign differently and integrate them thoughtfully. You can mix-and-match your channels to overcome based on the hurtles you‘re looking to clear in securing a meeting.

Channel	**Content Syndication**	**Display Advertising**	**Connected TV**	**Social Advertising**	**Email**
Goals	• Showcase expertise • Better qualify accounts • Highlight competitive advantages	• Remain top of mind • Expand reach within the buying committee • Increase brand affinity	• Enhance nurture sequences • Establish emotional connection • Demonstrate expertise	• Build trust • Encourage deeper interactions • Increase exposure	• Enhance personalization • Build community • Establish consistent touchpoints

Leverage Retargeting to Enhance your Nurture Strategy

Retargeting campaigns are a great way to maximize exposure when you‘re continuing to nurture your leads toward booking a sales meeting. Think about it—how many times have you downloaded an eBook or registered for a webinar, then completely forgotten about it? Leaning heavily into retargeting, particularly through LinkedIn and display ads, plays a pivotal role in increasing exposure and ensuring your leads remember who you are and why they came to you in the first place. LinkedIn retargeting allows you to remain visible to decision-makers in a business context through a trusted business platform. Display advertising, with its broad reach across the web, reinforces visibility and serves as a reminder to your leads that your offering provides the value they‘re looking for.

Match Channels with Their Optimal Content Type

Each channel has its own algorithm and will prioritize content that aligns to its best practice standards. To that end, you must build an awareness toward what type of content—from educational TOFU materials to social-proof BOFU collateral—will have the most success not just with your buyer, but with the channel itself.

Channel	Content Syndication	Display Advertising	Connected TV	Social Advertising	Email
Content Type	• Industry Reports • eBooks • Case studies	• Short-form testimonials • Interactive demos • Urgency reinforcement	• Videos focused on emotional connection • Engaging or thought-provoking videos • Success story videos	• Educational webinars • Social proof videos • Product tours	• Blog content • Webinars • Exclusive, subscriber-only content

Integrate Channel Data into a Single Platform

Unifying your channels' datasets into a single platform provides a holistic picture of lead engagement and progression throughout the sales funnel. As leads become hot, you don't want to miss an opportunity to beat your competition to a sales meeting. If you try to review metrics in separate channels, you'll end up reactive to your leads' progress versus engaging at the right time by keeping a proactive eye on their behaviors.

Ramp Email Strategy Up Alongside Funnel Movement

Subscribable content, like an email newsletter, has a regular cadence that helps keep you top of mind and lends itself to sharing a variety of content. When a lead is in the early stages, getting to know your brand and downloading educational content, you don't want to bombard them with emails and risk unsubscribes. While each business is different, consider a one email per week cadence to nurture TOFU leads. If a lead demonstrates high intent, such as consuming BOFU content or multiple buying committee members submitting forms, increase your email communications to them to about three times per week.

Utilize LinkedIn Immediately

LinkedIn is the leading B2B social media platform, with 82% of B2B marketers finding success on it with their lead generation efforts. And with about four out of five LinkedIn users driving business decisions within their buying committees, you need to leverage LinkedIn for all its worth—especially when it comes to the data it offers as you segment your messaging to the right persona and funnel stage.

Leverage LinkedIn to promote insightful content from your company page and company leaders that position your company as a thought leader. LinkedIn also offers a variety of ad formats and campaign objectives, which you can easily align with your targeting strategy.

Content Matching for LinkedIn Persona and Funnel Stage

Persona	TOFU Leads	MOFU Leads	BOFU Leads
End User	• Dynamic ads • Static image ads • Video ads	• Lead gen ads • Video ads • Static image ads	• Lead gen ads • Video ads • Static image ads • Document ads • Conversation ads
Technical Buyer	• Video ads • Text ads	• Video ads • Static image ads	• Video ads • Document ads • Thought leadership ads
Decision-Maker	• Static image ads • Video ads	• Lead gen ads • Video ads	• Video ads • Thought leadership ads • Conversation ads

Create a Variety of Nurture Paths

You may try to create the “golden path,” where leads follow the perfect route of content to initiate that first sales meeting. But your nurture strategy relies on your ability to anticipate and strategize around different scenarios where leads may fall off or lose momentum.

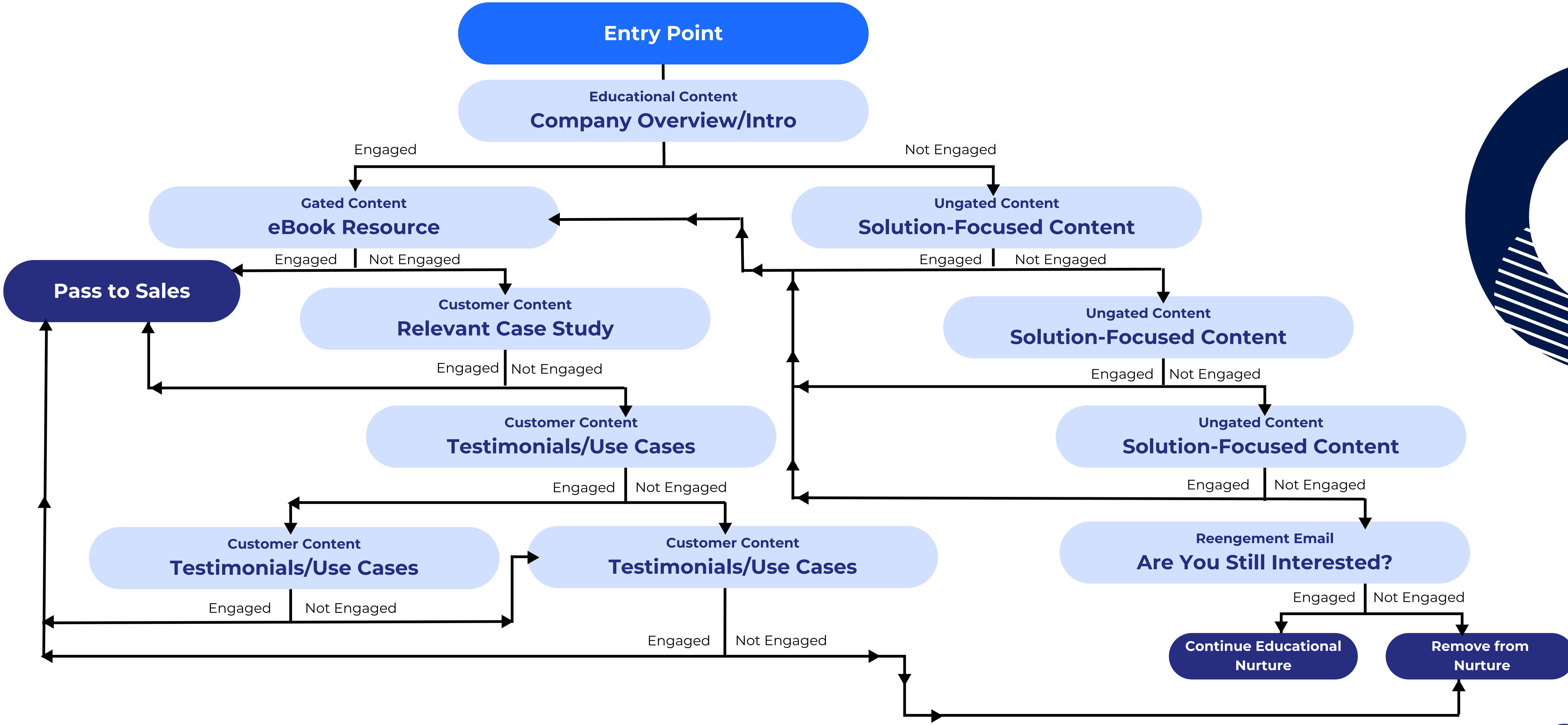
Think like your leads: What themes are they drawn to? How would they move from asset to asset? Then, consider your milestones from stage to stage. From there, you can chart out one nurture pathway around what you see as the golden path, and create branches for scenarios where leads may need more urgency.

For moving leads toward engaging with the sales team, there are a variety of different nurtures you can implement. Two nurture paths we like when guiding leads toward a sales meeting are **solution** and **reengagement** nurtures.

According to Forrester research, companies that excel at lead nurturing generate 50% more sales-ready leads at 33% lower cost.

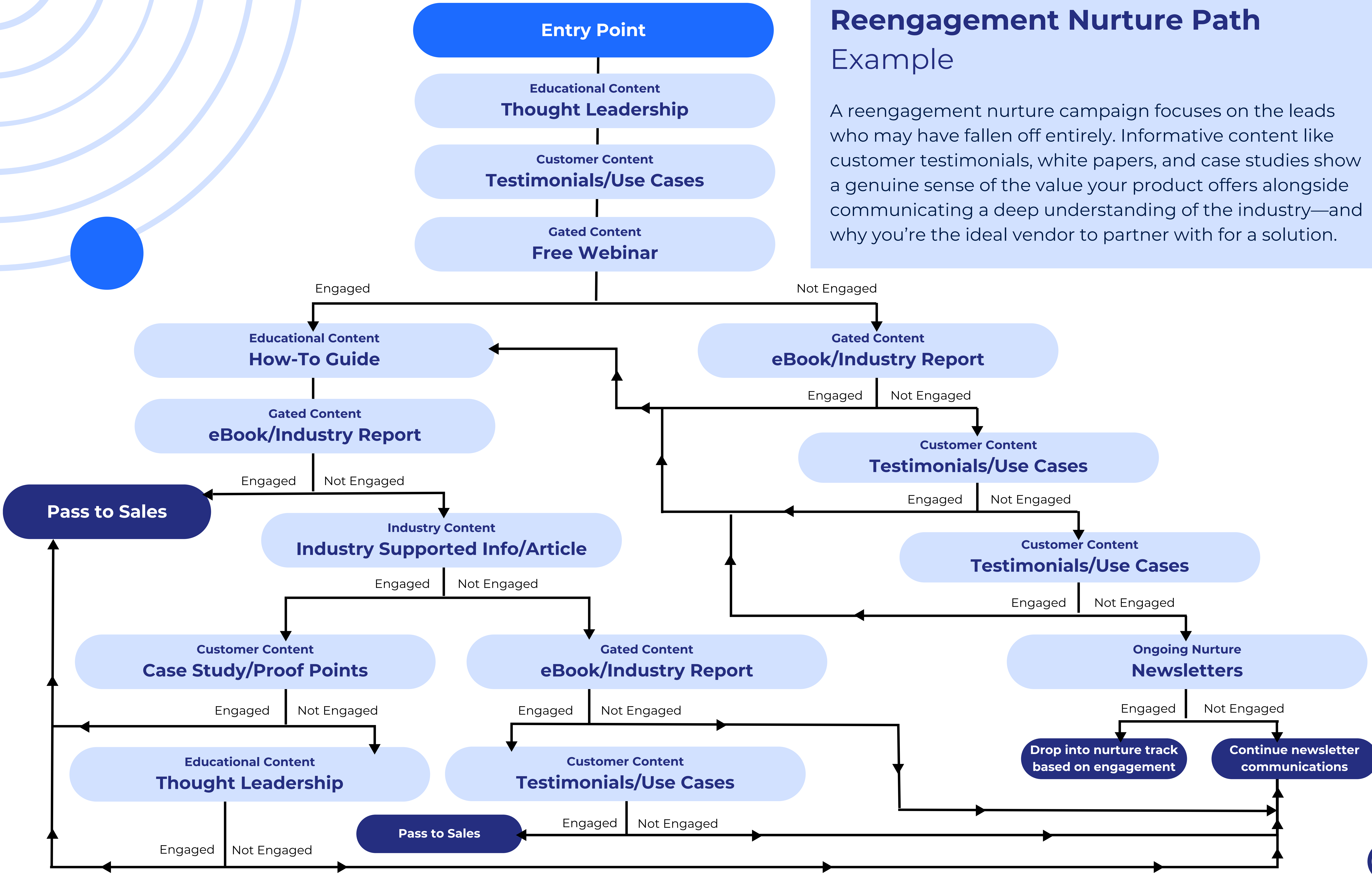
Solution Nurture Path Example

Leads may not have enough information and require more content to ignite the urgency to move forward. At this stage, where you're trying to get leads to meet with sales, solution nurture programs continue to educate prospects while providing more detailed information through content—such as webinars, buyer guides, and blog articles—that emphasizes how to solve their problems. You can also utilize display and social ads to keep your offerings top of mind.



Reengagement Nurture Path
Example

A reengagement nurture campaign focuses on the leads who may have fallen off entirely. Informative content like customer testimonials, white papers, and case studies show a genuine sense of the value your product offers alongside communicating a deep understanding of the industry—and why you're the ideal vendor to partner with for a solution.



How Madison Logic Does It

When a lead enters through a form, we first evaluate the persona and funnel stage. For us, demonstrating value and positioning across all available channels is paramount to successfully staying on top of our leads' minds and convincing them that we're the right partner for their needs. So, we over-index on LinkedIn and display advertising to surround buying committees wherever they consume information.

We have a monthly newsletter that features educational content where we target leads that need longer nurture paths, and also send promotional emails to mid-funnel leads. We regularly publish eBooks that we consider TOFU content and promote through newsletters, along with playbooks that are more MOFU content that we utilize content syndication to promote.

Retargeting is a huge strategy for us as well. We leverage LinkedIn and display advertising to retarget any inbound leads. The ML Platform allows us to integrate all of the primary paid channels (content syndication, display advertising, CTV advertising, and LinkedIn or other social advertising) so we can look at our leads holistically and know the precise moment a lead is ready for sales outreach.

Step Three Self-Assessment

- [ ] Have you aligned your channels with your buyer personas? How about funnel stage?
- [ ] Have you outlined what content format works with each channel?
- [ ] Is channel data available in a single view, or is data located in separate systems?
- [ ] Are you keeping a steady cadence with subscribable content, like emails?
- [ ] Are you utilizing LinkedIn with a variety of content across buyer personas?
- [ ] Do your nurture paths consider funnel stage and persona across channels?

LEVEL 1

Passing all inbound leads directly to sales without a nurture strategy in place.

LEVEL 2

Leveraging only email for linear, single-path nurtures, and not considering leveraging different content based on email engagement.

LEVEL 3

Implementing separate nurture paths that take into consideration funnel stage and persona on a variety of channels and measuring cross-channel success holistically.

Step Four: Cross-Collaborate with Sales

Marketing teams could focus solely on marketing strategy and the success of gaining marketing-qualified leads often miss the mark on meeting their goals. The Harvard Business Review found that 90% of sales and marketing professionals report misalignment in terms of their organizations' strategy, process, culture, and content—and nearly all respondents of the same survey believe this harms their business and customers. If your strategy remains "marketing does this and sales does that," it'll lead to poor coordination and sluggish sales velocity—which impacts the company's bottom line. If the goal is to move leads toward meeting with the sales team, you need to align your efforts with your sales team.

Discuss the Marketplace and Sales Pipeline

Sales insights inform more than your content strategy—they also inform campaign pacing and timelines. Learning how campaign performance aligns with the sales cycle is key. If sales pick up because of a campaign, marketing can then replicate that strategy to keep the momentum going. Of course, sales and marketing also need to understand buyer behavior, as there are most likely general benchmarks and standards around the product and industry where buyers are more (or less) likely to be in market (such as seasonality).

Set Clear Qualification Standards

One of marketing's goals is to provide sales teams with the types of leads that will convert, as opposed to simply handing off every inbound lead. Yet marketers will often hand every lead over for sales follow-up, which leads to a low volume of qualified leads. As you're developing your lead nurture strategy, make sure you understand exactly what your sales team classifies as a "hot lead." Having a better understanding of what makes a lead worthy for sales engagement helps you design a nurture strategy that will get them there.

Businesses with strong sales and marketing alignment are 67% more effective at closing deals and 58% better at retaining customers.

Determine Marketing & Sales Key Performance Indicators (KPIs)

While marketing's main KPI is driving sales engagement, insights from the sales team deepens everyone's understanding of the entire sales funnel alongside the metrics that matter to them. Outline additional KPIs and goals across each channel so everyone understands how you're working to successfully nurture leads toward a sales meeting. KPIs also help segment leads and fuel the matchmaking process between leads and sales, making sure that once a lead is ready for a sales conversation, everyone can study the buyer's behaviors across roles and industry, and how those demographics impact urgency.

Understand the Lead Scoring Model for Optimal Outreach Results

Sales teams easily fire off emails or pick up the phone as soon as a lead comes through. But if it takes more than 13 touches to prepare a lead for a sales conversation, it doesn't make sense for personal follow-ups for every inbound lead. Make sure the sales team understands your scoring model and what the next steps are once you hand a lead off to pursue for outreach.

Matchmake Leads Across the Sales Team

Think about your offering alongside your lead's intent and engagement, then pair them with the most qualified sales representative who can speak to the lead's specific concerns. The better that initial sales interaction is, the more trust you establish to continue the conversation toward later funnel stages.

Lean Into Creativity for Following Up

Inboxes are saturated with emails, and more people are avoiding phone calls from unknown numbers. Marketing teams can provide different ideas for outreach initiatives. Instead of a LinkedIn message, sales can send a LinkedIn voice message or video to the lead, which adds a sense of familiarity and personalization to really warm a lead up to interacting with the representative.

Align Messaging Within Sales Outreach

Both marketing and sales need to keep in mind that inbound leads are most likely familiar with your product. If the lead is ready for a sales meeting, they understand the brand. So, when a representative reaches out, they need to introduce themselves—not the solution—at a general, informational view.

Here's where the marketing team can offer outreach templates that match the buyer persona and outline a specific problem for the sales team to personalize. These customizable templates easily pave the way to a positive experience versus one that feels disjointed between the lead's stage within the funnel and overall engagement.

Questions to Ask the Sales Team About Meetings

- [ ] What's being discussed?
- [ ] How long is the meeting?
- [ ] Who is attending?
- [ ] What are common questions asked in this meeting?
- [ ] What do next steps look like?

Gather Feedback Proactively

The sales team gets a direct line to your prospective buyers. Dig into what sales reps are learning as they pursue the lead and the prospective meeting. The answers are crucial to continue refining and developing the right messaging for current and future campaigns.

Questions to Ask the Sales Team for Feedback

- [ ] What are you learning from these meetings?
- [ ] What objections are you hearing for not taking the call when you begin outreach?
- [ ] What pain points are you experiencing in the follow up process?
- [ ] How many touches do you need before the meeting occurs?
- [ ] How often do people schedule a meeting and not show up?

How Madison Logic Does It

Our sales and marketing alignment is one of the most important aspects in lead-to-meeting campaigns. Before we even kick off a lead generation campaign, we have a meeting with sales to outline:

- what we're promoting
- what channels we're using
- what our retargeting/nurturing strategy is
- what our goals, KPIs, and key messaging points are
- who our audience is
- what sales expectations look like.

Our marketing team provides sales with follow-up email templates that align with our messaging to enable fast outreach and replies while maintaining consistent tonality. Each campaign has its own CRM campaign, and we make sure lead scoring notifications are in place. From there, marketing has regular meetings with sales to present findings about campaign performance and any optimizations we're making. We open the floor up to sales to provide feedback to understand what they're finding from sales conversations so we can make any messaging adjustments.

Step Four Self-Assessment

- [ ] Do you meet with the sales team on a regular basis?
- [ ] Do both teams have a clear understanding of marketing and sales KPIs?
- [ ] Do both teams agree on the lead scoring model?
- [ ] Do both teams understand how lead qualification and nurture paths align?
- [ ] Does the sales team have enough templated responses to feel empowered with outreach?
- [ ] Do teams discuss feedback around messaging and lead quality with each other openly?

LEVEL 1

Running campaigns in a silo without outlining campaign goals and objectives before kickoff.

LEVEL 2

Establishing campaign goals and objectives ahead of campaign kickoff, without regular reporting or feedback sharing from both teams.

LEVEL 3

Full sales and marketing alignment, including regular touch based and reporting read outs, alignment on both messaging and follow up strategy, and cross-functional feedback loop to optimize both sales follow-up and campaign optimizations.

Step Five: Measure and Optimize Your Campaigns Toward Success

The final step is not really final—it's constant, repeatable measurement and evaluation to figure out whether your campaigns are successful, then optimizing your strategy with those findings. Keep your eye on the market and continue to collaborate with the sales team, as market conditions impact the customer cycle and your pipeline and revenue goals may adjust from quarter to quarter.

Measure and Optimize Around Leading & Lagging Indicators

Company size and growth stage impacts where you align with your overall industry marketing benchmarks. Still, understanding foundational marketing and sales metrics, like customer acquisition cost, conversion rate, and deal velocity, and how each channel impacts them will show how successful your channels are in terms of engagement, and where you can maximize results. Breaking your marketing and sales metrics down into their leading and lagging indicators allows you a deeper layer toward understanding how your content and messaging performs across campaigns.

Leading indicators contribute to your goals, but aren't guaranteed and can fluctuate from campaign to campaign, month over month. Lagging indicators take longer to measure, and need ample time before optimizations should be made. You'll want to gather historical data for both, but lagging indicators will be more quantifiable after going through your sales cycle two or three times.

Leading indicators

- Website traffic
- Clicks/engagement
- Content downloads
- Webinar registrations
- Lead quality

Lagging indicators

- Appointments booked
- Conversion rate
- ROI
- Drop off rate
- Pipeline generation

Set Individual Channel KPIs That Roll Up Into Campaign KPIs

Measuring campaign performance isn't just about converting leads to take sales meetings. It's important to also measure success within each marketing and advertising channel. Success within an email program will look drastically different than success within a display program, but they're all indicators of the overall health and success of your campaign. Ideally, you measure each program on an ongoing basis with their specific KPIs, gather your findings into a monthly report, and tie all activities together into a full campaign readout. This helps you understand which channel's leads are most responsive and how those channels impact lead scoring.

Channel	Content Syndication	Display Advertising	Connected TV	Social Advertising	Email	Organic Social
Metrics to Measure	• Lead volume • CPL	• Reach • Impressions	• Reach • Impressions	• View through rate (VTR) • Click through rate (CTR) • Impressions	• Opens • Clicks • Unsubscribes • Lead volume	• Shares • Comments • Likes

Reporting also requires you to dive deeper into your data (which is hopefully already in a single, holistic view) to determine how each channel impacts pipeline and revenue on an individual and collective campaign basis. And with your findings, you can then optimize each channel with content that not only serves each metric, but fuels conversations around how these metrics are indicative of a strong marketing strategy that fuels higher quality interactions that will ultimately benefit your company's bottom line.

Measure Lead Quality During Nurture Stages of the Funnel

Throughout the nurture process, measure the quality of each lead you're nurturing and any disqualification trends you identify. If you're receiving out-of-market leads or a large drop during the nurture stage, analyze your initial targeting, channel, and content strategies, and optimize each strategy with your findings. You may also need to adjust timelines per channel, as algorithm and marketplace conditions may impact buyer behavior and visibility of your campaigns.

Optimize KPIs for Personas in the Buying Committee

Your KPIs aren't just a foundation for goals or focus to optimize your channels toward—they're reactive to *who* you're targeting in the first place. Buying committees may change their initial point person or decision-makers for a variety of reasons. Ideally, your KPIs are set to gather leads who will move toward that initial call versus a buying committee member who will just have to sign off on the partnership.

One practice to consider is to measure the initial lead's engagement with your engagement benchmarks, then drop the benchmark by 10% for corresponding buying committee members since they're not as invested yet. Track their behaviors and segment your findings according to similar accounts within the funnel, and compare their behaviors with current and previous clients to consider what their buyer journey may look like. This practice will eventually plot out a timeline for leads initiating contact with or responding to a salesperson.

Prioritize Your Potential Advocates

When you think about how to divide your campaign efforts, prioritize the personas who will advocate for you. If you can deliver enough content and generate enough engagement with the personas who are the most influential, they'll do the work for you to convince the rest of the buying committee that you are the right partner and tool to help them achieve departmental and company goals. Once you identify your advocates, consider their persona and optimize future campaigns around similar demographics.

High-intent forms include a demo request or contact form, while low-intent forms may be a webinar registration or eBook download. While leads can skip around the content tiers, moving from TOFU to BOFU content, they may potentially stall. One way to avoid sudden jumps around content is to pair your content, but you can also take actions into a more technical space by A/B testing CTA copy, button placement on a landing page, and reading suggestions. Keep in mind that you will only want to test one element at a time and measure it for a set time period before optimizing everything across your website.

Measure Metrics Against KPIs on a Regular Basis and Optimize

Measuring and analyzing shared KPIs is crucial for understanding the effectiveness of your campaigns. With regular tracking, these metrics allow sales and marketing teams to identify areas for improvement, adjust tactics accordingly, and ensure all efforts are aligned and focused on delivering the best possible customer experience.

Monitoring Frequency	KPI Analysis	Optimization Tactics
Weekly	• Impressions • Engagement • Website visits • Lead delivery	• A/B testing for messaging, content formats, ad creative • Compare performance against industry benchmarks
Monthly	• Appointments • Cross-channel reach • Account engagement	• Refine persona targeting for each channel • Replace or remove the lowest performing content • Disable the lowest performing ads or replace ad message • Add more proof points (case studies, customer testimonials, award credentials, etc.) • Dial up re-targeting through display and social ads with educational content or case studies for low engaging accounts
Quarterly	• Closed/won business • Generated/ influenced pipeline • Time to close	• Refine audience segmentation or create small segments to focus on selling specific solutions, verticals, or topics • Review intent data for best content and recommended topics • Reallocate budgets between channels • Review nurture programs, lead routing processes, and MAP scoring, and optimize • Review process for sales outreach and optimize

How Madison Logic Does It

A key to the success of our measurement and optimization strategy is reviewing all campaign data holistically in the ML Platform. Having all our systems integrated together helps us make optimizations quickly and report on success efficiently.

We set up a regular schedule to report on both leading and lagging indicators. For leading indicators, we provide weekly reporting. For lagging indicators, we provide quarterly reports. Our reporting and optimization metrics feed back into our targeting strategy, informing us whether we need to make audience adjustments for our nurture strategies.

Step Five Self-Assessment

- [ ] Do you measure and optimize channels on an ongoing basis?
- [ ] What are the measures for success with each campaign beyond leads meeting with the sales team?
- [ ] Have you identified leading and lagging factors to measure and optimize campaigns?
- [ ] Do you measure the metrics that matter to each channel on an individual basis?
- [ ] Are you reporting on each channel's metrics on a monthly basis?
- [ ] Are you optimizing channel performance with your findings?
- [ ] Are you assigning KPIs to each buyer persona?
- [ ]

LEVEL 1

Only reviewing leading indicators by individual channel.

LEVEL 2

Measuring both leading and lagging indicators, but only looking at individual channels in separate platforms.

LEVEL 3

Consolidating all marketing and advertising efforts into a single platform to review leading and lagging indicators across every channel and using campaign learnings to optimize efforts.

It's Time to Put the "Convert" in Conver(t)sation

This blueprint breaks down your campaign strategy into easy-to-implement steps that remove the complexity and overwhelm that occurs when you're looking to advance your leads into sales-ready prospects. Remember as you implement these steps: blueprints simply lay out a foundation for you to build upon. When you have a strong internal workflow and understanding of your leads' concerns, campaign objectives, and how to optimize campaigns around data and feedback, you create a well-oiled marketing machine that swiftly moves high-quality leads to speak with your sales team.

Go forth, marketing rockstar—it's time to convert those leads into conversations.

Let Madison Logic Set the Table for Stronger Outreach

Buyer intent data is too important to misconstrue—and with some buying committees having upwards of 14 people at a time, you need to keep track of everyone's behaviors to ensure you can catch buyers at the optimal time of engagement.

Madison Logic is an ABM platform that bridges your data from multiple source systems into a single platform to empower marketers to make better data-driven decisions. By gathering proprietary engagement data, technographic data, and B2B buyer research into a comprehensive data set, you gain access to a best-in-class lead scoring system to quickly identify, target, and segment high-quality, in-market buyers.

> Our integration with Madison Logic and Marketo has definitely been a game changer. Leads are directly routed into our mapping system, we're able to view the data, and then see their actionable states within it. And we're also able to nurture the leads that do come in, and then able to communicate seamlessly with our sales teams."
>
> **Erin Pak**
> **Demand Generation Manager**
> **Flexential**

Looking to create impactful points of conversation? Find out what Madison Logic can do for you.

- Book a Demo
- Read the Blog
- Contact Us
- Follow us on LinkedIn