

Focused Outreach Lead Generation

**A 10-Step Guide to Produce High Quality Leads and
Raise Your ROI**

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Introduction

Are you sick and tired of hacking through a jungle of information about lead generation? I wrote this e-book to make your strategy clear as day, with the essential first steps to plan and implement a lead generation effort that delivers results beyond your current expectations.

This guide presents key strategies that work for our clients, and you'll see them step by step. No, we're not going to overwhelm you with complicated mountains of information. This is a practical guide on the key steps to get you started.

So let's get started!

What is Focused Outreach Lead Generation?

Focused Outreach Lead Generation is a strategy to reach out to a focused target audience to develop interest, consideration, or demand for products or services that provide value to the buyer.

Reaching out to prospects or customers is traditionally referred to as an outbound effort. It's your "push" to engage with the ideal customer, audiences or markets you want to connect with.

Why Focused Outreach Lead Generation?

Focused Outreach Lead Generation can benefit your organization if you want to:

- stimulate awareness
- stimulate consideration
- generate leads
- create demand
- develop sales

Is This Strategy Right for You?

That depends entirely on your goals.

Ask yourself some basic questions about your target market, and objectives. How you answer these questions will determine if Focused Outreach Lead Generation can be a powerful strategy for you:

What do you know about your target?

- Do you want to better penetrate target accounts and uncover potential opportunities?
- Do you want to profile target accounts to know where opportunities do and do not lie?
- Do you want to connect with your target audience?

- Do you want to understand how buyers in your industry expect to be communicated with?
- Do you want to understand how buyers in your industry evaluate and buy?

What are your goals?

- Do you want to build a strong sales pipeline to meet revenue objectives?
- Do you want more qualified leads than your inbound efforts are currently generating?
- Do you want to test Inside Sales with a proof of concept before building an in-house or outsourced effort?
- Do you want to test if you can sell your offering on the web?
- Do you want to generate awareness, consideration, to inform, or educate your target audience?
- Do you want to maximize the efforts of the Sales Team?
- Do you want to test a new product, service, offering, market, or territory?
- Do you want to uncover and nurture opportunities with a focused group?
- Do you want to introduce, invite, or follow up with attendees to an event?
- Do you want to conduct a survey or obtain research information?

If you and your team can answer yes to any of these questions, Focused Outreach Lead Generation can help you reach your goal.

Now, the 10-Step Strategy.

1. STEP ONE

Define the Focused Outreach Lead Generation Objective

First figure out why you're initiating Focused Outreach Lead Generation.

Before you strategize, know your objective.

The list on the prior page outlines many of the goals that prompted our customers to initiate a Focused Outreach Lead Generation initiative.

Your goal may be similar or you may have another goal that's completely unique. Whatever your goal, the more specific and clear your objective, the better your chance of reaching it. Defining the goal first is critical because it impacts the strategy, planning and execution decisions that follow.

A key point: when defining goals, collaborate.

Get participation among key players, solicit input, listen, and understand. Once the objective is agreed upon, distribute, solicit confirmation and make sure the assembled key players are in agreement before moving forward. Key players can be as little as two individuals. Avoid operating in a vacuum. Address and work through potential pitfalls early.

2. STEP TWO

Appoint Appropriate Department Representatives to the Program: Sales, Marketing, and CRM Systems

So, who are the key players and which departments do they represent?

Focused Outreach is usually initiated by Sales. At times Marketing may initiate. Regardless, the work requires insight and collaboration between Sales, Marketing, and Customer Relationship Management (CRM) Systems for the greatest results. It becomes essential that Sales, Marketing and CRM Systems are aligned and communicating on key issues.

Other departments may be involved as well, depending on the type of program you are conducting. In one case, we conducted a Focused Outreach initiative for Sales and Professional Services to introduce a workshop to help their current customers. So here the Professional Services department provided a key player to the planning and execution of the initiative.

Here's how each group contributes:

Who decides the list of customers and prospect data? Sales.

Sales traditionally initiates the Focused Outreach Lead Generation program in response to a need.

Sales is responsible for defining the target markets, accounts, audiences and territories for the Focused Outreach Lead Generation initiative.

Who provides the lists of customer and prospect data? Marketing.

Marketing, working closely with Sales, will usually identify the best sources.

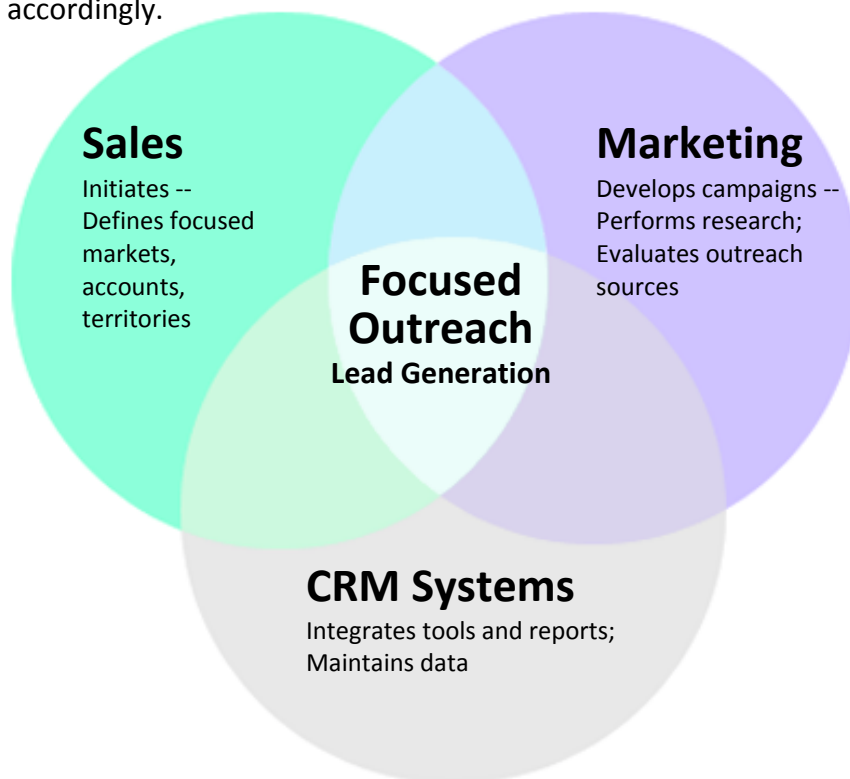
Marketing is responsible for developing and implementing marketing campaigns, such as a webinar or virtual event. In this role, they are tasked with researching, evaluating, procuring, editing, and managing prospect data to be used in these programs. Sales works with Marketing to secure highly targeted customer and prospect data.

Who will organize and maintain the list of customer and prospect data? CRM Systems.

CRM Systems is usually responsible for implementing and maintaining the company's central customer relationship management system.

In this role, CRM Systems traditionally imports and exports lists, maintains, cleans information and data, implements defined fields, customizes reports and integrates tools.

Once Sales representatives decide on the information they need, and define their data capture and reporting requirements, Sales needs to work with CRM Systems to set up the tools accordingly.



3. STEP THREE

Put Knowing Your Buyer at the Forefront of Your Plan

Today it is essential that your buyers experience you in a way that works for them. Learn your buyer's mindset. It seems common sense. That doesn't make it easy.

Plan a Focused Outreach Lead Generation initiative that keeps the buyer in the forefront with every touch point.

Enhance buyer experience and make interactions top notch, engaging, helpful, informative, easy and pleasant. It is only when prospects or customers feel understood and engaged with a company that they will consider a purchase from the company.

Ask yourself questions like these to better understand your buyer's mindset, needs, behavior, goals, patterns, and preferences in their own terms:

- Who is your ideal buyer?
- How do your buyers find you or your competitors?
- Is it easy to find you or your competitors?
- Where do your buyers find you or your competitors?
- What business goal was the buyer looking to achieve?
- What is the buyer's research process?
- Who conducts their research process?
- What was their decision making process?
- Who made the decision?
- What other alternatives did they consider?
- How would your buyer rate their research and buying experience with your company?
- How would the buyer rate their research and buying experience with your competitors?
- What was positive about their experience with your company?

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- What could be improved about their experience with your company?
 - What could be improved about their experience with your competitors?

Answers to these questions will help you better understand and serve your ideal buyer.

4. STEP FOUR

Plan

Would you build a house without a plan? Hopefully not. Then why would you build a Focused Outreach Lead Generation initiative without a plan? The consequences of building a poorly planned house are the same for a poorly planned Focused Outreach Lead Generation initiative.

Planning is critical to success. Without a roadmap, the process can be chaotic at best, doomed to failure at worst, and nearly impossible to adjust for maximum results or to make appropriate, educated and informed changes while underway.

Companies may feel compelled to charge ahead and execute without a documented, approved plan. Once they dive in, program managers begin to understand the importance of planning as they soon discover:

- looking at historical data would have prevented painful mistakes
- previous messaging is dated or doesn't address the current program objective
- representatives don't know how to define or distinguish leads
- representatives are unsure who to call if they need an answer to a prospect's question
- pain points and solutions don't really apply to this target audience
- prospect lists don't really reflect accurate contact titles
- Sales doesn't feel lead generation is sending qualified leads
- previous metrics are not optimal for this type of Focused Outreach Lead Generation initiative
- Inside Sales - Lead Generation doesn't know where to collect lead qualification data in their CRM system
- Sales doesn't know where to find lead generation data in their CRM system
- key data gathered to make internal decisions is hard to find and access
- reporting is inaccurate and time consuming
- new tools are needed to improve efficiency and productivity

- there is disagreement over which markets to target
- guides are dated and no longer compelling
- program process is lacking

As companies review their previous outbound programs, it becomes evident that “look before you leap” is a sounder strategy than “jump in with both feet” before you know how far down the bottom is.

A successful Focused Outreach Lead Generation initiative needs a proven method or approach to reach the desired business goal.

Here are important topics to address during the planning phase:

- Objective
- Resources
- Sales and Marketing
- Customers
- Buying Behavior
- Buyer, Lead, and Sales Model
- Territory Definition and Outreach Sources
- Messaging
- Focused Outreach Lead Generation Processes
- Focused Outreach Lead Generation Guides
- Measurement Guidelines
- Technology and Productivity Tools

Use these topics as a foundation to begin planning a Focused Outreach Lead Generation initiative. Discussion, input, final agreement and approval of a plan will provide a framework for implementation and adjustment.

5. STEP FIVE

Assign the Right Resources to the Right Job

One of the key factors to successful Focused Outreach Lead Generation is having the right resources performing the right tasks.

Get the right resource aligned with the right job, and dedicate a resource to manage the campaign.

Far too often success is impeded by having the wrong resource performing the right task or by having the right resource performing the wrong task. These are two of the most common pitfalls behind underperforming efforts.

Pitfall #1: Wrong Resource, Right Task

Field Sales Generating Leads

In industries where large, complex sales and longer sales cycles are common, Field Sales is usually responsible for accounts in their territory. These sales opportunities involve many players, meetings, and coordination with other internal company resources, which demands a great deal of time. In situations where Field Sales is responsible for both selling and lead generation activities, lead generation goes by the wayside as time is fully consumed by Field Sales activities.

But what about the sales pipeline? Who fills it for the future and how? What about next year, or next quarter?

Generating leads to build a solid pipeline is a key task but it should not be performed by the Field Sales force. Most Field Sales representatives will focus on their core competency and manage and close opportunities to make their quota, and will not have the time or expertise to manage a focused, consistent lead generation effort.

Solution: Make the right assignments -- dedicate lead generation representatives to the Focused Outreach Lead Generation tasks.

Pitfall #2: Right Resource, Wrong Task

Inside Sales is Assigned Lead Generation and Additional Tasks

You may assign the right resources to the right task -- Inside Sales assigned to lead generation -- but include the wrong tasks in the mix of responsibilities. (For example, Inside Sales - Lead Generation may also be given marketing and administrative tasks.) This impedes the productivity and efficiency of Inside Sales.

Critical to success is having the person in the right role, and avoiding multiple assignments that require different skill sets. You may be tempted to cut costs by assigning many unrelated tasks to one resource. But in the long run, a company is hurt rather than helped by giving one resource multiple responsibilities that need different skill sets. Multi-tasking demands time to learn different skills, which waters down the focus on lead generation.

You are best served by assigning a qualified, skilled Inside Sales - Lead Generation resource who can dedicate time and effort to test and deliver lead generation results.

Solution: Assign Inside Sales - Lead Generation only Focused Outreach Lead Generation tasks – and avoid adding responsibilities for other tasks.

Dedicate a resource to manage your Focused Outreach Lead Generation effort.

Do not overlook the essential role of the manager. A vital part of a successful initiative is having a dedicated manager to coordinate, moderate, manage and adjust the program. If there is an established Inside Sales - Lead Generation group, these Inside Sales leaders are the best resources to manage the initiative. If there isn't an Inside Sales resource dedicated to Focused Outreach, another resource must fill the role of the leader.

Here's why. Developing and managing a Focused Outreach Lead Generation initiative involves attention to many details; constant communication between relevant

departments tends to be voluminous. The successful execution of a Focused Outreach Lead Generation initiative requires focus and dedication at the helm.

What are the responsibilities of the role and who may be a good fit to take this on? While not a complete list, here is a brief outline of responsibilities and characteristics that best fit the role to get you started:

Responsibilities of a Focused Outreach Lead Generation Manager:

- Develop and adjust a strategic outline
- Monitor and manage focused sales prospecting and lead generation implementation
- Incorporate process and metrics with attention to real world business savvy
- Define or refine essential components such as value proposition and messaging
- Implement use of forward thinking tools to improve productivity and/or efficiency
- Use CRM Systems and outbound target sources
- Work collaboratively with other relevant departments

Characteristics for Best Fit

- Proven experience developing and implementing Focused Outreach Lead Generation initiatives
- Keen awareness and knowledge of customers and/or prospect buying behavior
- Outstanding writing and verbal communication skills
- Creative use of proven and promising technology tools
- Willingness to try, test, and measure for success
- Basic personal traits include: highly motivated, dedicated, committed, people-oriented, knowledgeable
- Eager to learn, and success-oriented (a must-have)

6. STEP SIX

Outline and Manage Key Tasks to Completion

You have many decisions to make when planning your Focused Outreach initiative. One reason to have one individual orchestrate the initiative is to provide focused, timely, and consistent decision making and guidance.

Take one topic for example: territory. Look at the number of questions you'll raise as you address this one topic alone:

- Are you targeting geographic areas or accounts?
- If geographic areas, what are the areas?
- If accounts, which accounts?
- Who will decide and approve the geographic areas or accounts?
- Will the Focused Outreach Lead Generation initiative be a pilot program in one or more territories?
- If multiple territories, which ones?

These questions may seem simple. However they address just one topic in your plan. Other tasks on your list for that day, week or month require time, resources, dedication and know-how to address.

As you address this and many other topics in your plan, you'll build a task outline to keep tasks organized and keep completion dates on schedule.

Start with these steps to outline and manage key tasks effectively:

- Outline the timeframe for the Focused Outreach Lead Generation initiative
- Identify key topics provided in your plan
- Identify and outline tasks to be completed
- Decide who is best to complete the task
- Assign a timeline for each task

- Review consistently to ensure your initiative is developed and implemented on schedule

To many, this work seems unnecessary. But it is essential. Without an outline of step-by-step tasks, unforeseen obstacles and delays are harder to overcome. We have seen over and over that skipping this step creates stumbling blocks that threaten your success. You will be way ahead of the majority of your competitors if you are diligent about implementing an outline of key tasks.

Here are a few tips to quickly get you started:

- Ensure contributors know what they are expected to deliver and by when – communicate effectively and avoid surprises
- Develop and distribute to everyone a list of tasks assigned with a timeframe – this gives everyone the big picture of the interplay between completed tasks and the overall impact of delays
- Present the plan in an easy to understand, visually inviting manner – this will help ensure it is read, followed, used and updated
- Balance detail with usability and information needed for understanding
- Review consistently to monitor progress, address obstacles and avoid pitfalls
- Be brief and relevant during reviews

7. STEP SEVEN

Messaging

Knowing your buyer is key. Equally important is communicating with buyers and sending them messages that resonate for them. Prove that you know and understand them. This will position you well to compete, engage, help, and win your buyer.

Like lead generation in general, crafting and delivering messaging is an art and science requiring expertise and testing to perfect. Consider this as you develop messaging:

1. Know what your buyer wants, and deliver
2. Vary messaging through your buyer's communication preferences
3. Consider 7- 12 touch points before your buyer becomes aware
4. Use sales intelligence tools to learn about your buyer and customize your message
5. All departments should know your message and share it with everyone

Messaging matters. Craft it to appeal to your buyer's needs. Be creative, bold, compelling, different, and -- Test! Test! Test!

8. STEP EIGHT

Technology

Technology will help you execute a Focused Outreach Lead Generation initiative in less time with better results.

1. **Crucial to a successful Focused Outreach Lead Generation initiative is a central CRM system** to store, manage and report prospect and buyer data. It is essential to have a system that is comprehensive, yet easy to use, administer, and navigate. Data fields need to reflect and collect buyer qualification, profile information, and buyer lead and sales data. Reporting should consistently provide lead generation representatives, sales representatives and executive management with activity and results clearly and concisely.
2. **Email marketing is a cost effective medium** to stay in touch and communicate with prospects and buyers. An email management system will help you maintain a professional image and automate the process, improving efficiency and saving time.
3. **Invest in sales intelligence technologies to better understand your buyer** and each buyer's unique situation and needs. Save your lead generation representatives countless research hours and improve their productivity.
4. **Web analytics will help you better understand the buying behavior and evaluation process of your buyer.** In many cases analytics tools are inexpensive, easy to install, and can provide valuable, relevant information to help you give your buyers what they need to buy from you.

These are a few technologies that will increase the effectiveness, efficiency and productivity of your efforts.

9. STEP NINE

Train to Implement Your Plan

These are the must-have elements – not just nice-to-haves – to successfully train your Inside Sales - Lead Generation representatives.

The type of training involved here is not about teaching a novice to perform certain functions or to give professionals new techniques to enhance creativity in performing their jobs. Before training, we make sure that the people involved in the Focused Outreach Lead Generation initiative are experienced, proven, and are able to excel at the assigned tasks.

The training we're talking about is simple and direct. Teach what's required to deliver desired results from the Focused Outreach Lead Generation initiative.

In order to be effective in conducting the effort, Inside Sales must command knowledge in some depth about the company, products or services, and the market they are serving.

Training should include the following:

- Competition: Strengths / Weaknesses / Differentials
- Messaging: Value Proposition / Benefits / ROI
- Audience: Pain Resolution / Pleasure Achievement / Related Buyer Successes
- Measurement Guidelines
- Buyer, Lead and Sales Model
- Focused Outreach: Systems / Processes / Tools

Answer questions as they come up with regular Q&A sessions.

As your initiative gets underway, a wide variety of questions will often emerge as you interact with prospects and customers. Those questions may deal with an objection

raised, pricing, references, client base, or company background, to name a few. The question may call for input from another department, such as Sales, Marketing, Product Development, Engineering, Manufacturing, Distribution, Legal, Customer Service or Technical Support. Different contacts within your company may be the best resource to respond and provide an answer.

Make a point to address these questions with the appropriate people. If the Focused Outreach initiative consists of two or more implementers, it may be a good idea to coordinate weekly discussions to share questions and answers for better informed dialog with buyers and customers.

Here are a few tips to keep your training engaging:

1. Make it brief, yet relevant
2. Encourage interaction
3. Develop clear, concise easy-to-understand guides
4. Avoid excessive slides, lecturing
5. Use real world stories and examples
6. Provide simple, captivating take-aways

10. STEP TEN

Review and Adapt

Okay, you are well on your way to launch your Focused Outreach Lead Generation effort. You've defined your objective, developed a customer centered plan, outlined and assigned tasks, and chosen and trained your resources. A properly developed, highly targeted plan is a foolproof recipe for success. Right? Wrong. Not without this last step.

All your work to develop and implement a strategy does increase the probability that you will reach your objective. But success doesn't happen automatically. Why not? All the planning in the world is never a substitute for the real thing.

Have you ever participated in a sport? As with sports training, preparation and planning only take you so far. If you want to win, you have to apply your training to real life, learn what works and what doesn't, and fine tune your strategy. The same is true for your Focused Outreach Lead Generation initiative.

You'll need to monitor all aspects of program performance against the objective. Are you meeting the objective or not? If you are, great. But if not, you'll need to find out why and adjust accordingly.

The Focused Outreach Lead Generation initiative manager should consistently and continuously review and adapt the program for success. Here are three important keys to getting the right feedback and making adjustments smoothly:

- Develop a reporting system that's easy to update
- Solicit feedback about activity and results from Inside Sales - Lead Generation with regularly scheduled interactions
- Participate in and monitor conversations with buyers and prospects

Conclusion

You can create and implement a powerfully effective Focused Outreach Lead Generation program for your company. These 10 beginning steps are at the heart of successful Focused Outreach efforts we lead professionally at Exceed Sales. By constructing, engaging, and retuning to convert, your team can produce higher quality leads and greatly improve your company's return on your lead generation initiatives.

About the Author

Elisa Ciarametaro is founder and CEO of Exceed Sales, providing end-to-end lead generation services that deliver results. Exceed Sales partners with executives to develop and execute Inside Sales - Lead Generation and demand generation strategies. Companies team with Exceed Sales to dramatically improve lead generation results. Learn more at www.ExceedSales.com or at Elisa's blog, www.ExceedSales.com/blog.

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