

# Trusted Partnership Delivers Business Development Success

## The Lead Qualification Model

Intronis already had capital. It needed something practical—a robust, scalable lead generation process to spark further sales. The fast-growing firm has one now, thanks to its ongoing relationship with OpenView Venture Partners.

In 2009, Sam Gutmann and his staff at Intronis were increasing sales and downing coffee. They were generating business and buzz, energized by their powerful software.

But Gutmann realized Intronis needed a jolt, a better way to qualify key prospects and convert them into long-term customers. His sales team was focusing primarily on leads generated from inbound sources such as the firm's website. "We had limited resources, and needed a process-oriented approach to outbound sales — a system that was defined and repeatable," says Gutmann, President and CEO of Intronis.

Creating that system in-house would mean hiring, training and managing people who would quickly need to learn the best practices of outbound lead generation. Instead of taxing their time-strapped team, Gutmann and Eric Webster, Intronis' Vice President of Sales and Marketing, turned to a trusted partner.

"From the beginning of our partnership [in 2007], we recognized that OpenView wasn't a typical venture capital firm," Gutmann says. "They weren't going to simply write us checks and chime in at board meetings. They care deeply about our growth, and give us expert guidance and ongoing resources to help make that growth happen."



### THE CASE IN POINT

**WHO** Founded in 2003, **Intronis** ([www.intronis.com](http://www.intronis.com)) is an **online data backup and recovery solution** for managed service providers (MSPs). It offers MSPs a secure data solution combined with a robust partner program, the convenience of online account management and top-quality customer support.

**WHY** Intronis wanted a **better way to qualify key prospects and convert them into long-term customers**. Its time-strapped sales team was focusing primarily on leads generated from inbound sources. Intronis wanted a process-oriented approach to outbound sales that was defined, repeatable and successful.

**HOW** Intronis turned to OpenView Venture Partners, which made a capital investment in the company in 2007 and continues to provide operational and management expertise through its OpenView Labs unit. Together, Intronis and OpenView crafted **a plan to staff, execute, manage and measure the new business development process**.

**WHAT** Sparked by the business-development plan, Intronis' **sales to the MSP market more than doubled in 2009**. Sam Gutmann, the firm's president and CEO, expects those sales to increase **at least 150% more in 2010**.





“OpenView cares deeply about our growth, and gives us expert guidance and ongoing resources to help make that growth happen.”

**Sam Gutmann**, President  
and CEO, Intronis

## A Smarter Way to Target Key Prospects

To further its growth, Intronis aimed to deliver an important message to managed services providers (MSPs), which essentially serve as their clients' IT departments: Conventional data backup methods such as tapes and CDs are incomplete and inefficient, and organizations of any size can now enjoy the benefits of automatic, offsite, secure data protection.

Today, many MSPs seek to offer secure, on-demand data storage and backup as a way to generate recurring monthly revenue, increase margins and form closer client relationships, Gutmann says. Intronis enables those MSPs to rebrand its software as their own offering. That's why Gutmann and Webster wanted Intronis to have a new way to target more MSPs, call on their decision-makers and deliver succinct sales messages to them.

“OpenView's model is built around contributing significant operational value add in areas where portfolio companies need help and support,” says Kobie Fuller, Senior Associate at OpenView.

To that end, OpenView crafted and delivered an outbound prospecting plan for Intronis that included details about staffing, executing, tracking and managing the business-development process.

# Better Leads, Higher Sales

A Powerful Process in Just 8 Weeks

## WEEK 1

- Develop and commit to a set of goals and metrics
- Define minimum lead criteria for screening
- Define opportunity for lead qualification
- Develop lead qualification specialist (LQS) and LQS manager profile and launch recruiting effort

## WEEK 2

- Develop training material
- Develop call scripts, FAQs, buyer personas and other sales-related content
- Set up call views in customer relationship management (CRM) system
- Create automated reports and dashboards
- Develop campaign prioritization scheme
- Prepare generic email templates in CRM system
- Create performance-based compensation component for LQS to drive performance

## WEEK 3

- Prioritize target segments (ongoing)
- Prepare campaign-specific content (ongoing)
- Qualify raw leads against minimum criteria (ongoing)

## WEEK 4

- Finalize staffing of LQS and LQS manager roles
- Train LQS on product, competition, delivery and logging activities
- Set expectations for LQS and management
- Provision leads from new qualified leads with follow-up, and qualified leads with next action in upcoming week (ongoing)
- Launch campaigns against target segments using the templates (ongoing)

## WEEKS 5-8

- Track progress as LQS works to hit targets
- Conduct call listening and provide feedback and coaching
- Conduct retrospective reviews weekly or biweekly
- Conduct prospect reviews
- Hold LQS accountable and management accountable to their targets

## The Right Process, the Right People

In July 2009, OpenView identified Eric Winn as an ideal person to kick-start the business development plan as a lead qualification specialist (LQS). While receiving training from OpenView's Fuller (about appropriately qualifying the lead, asking the right questions during cold calling, developing a compelling script, listening for signs of interest, handling rejection, etc.) and Intronis' Webster (about Intronis and its software), Winn began making at least 60 calls a day to a targeted list of MSPs.

"Generating leads is a challenge for any company," Gutmann says. "Immediately, we saw that the new process would ensure not only a higher *number* of leads, but the right *quality* of leads—that's what we wanted."

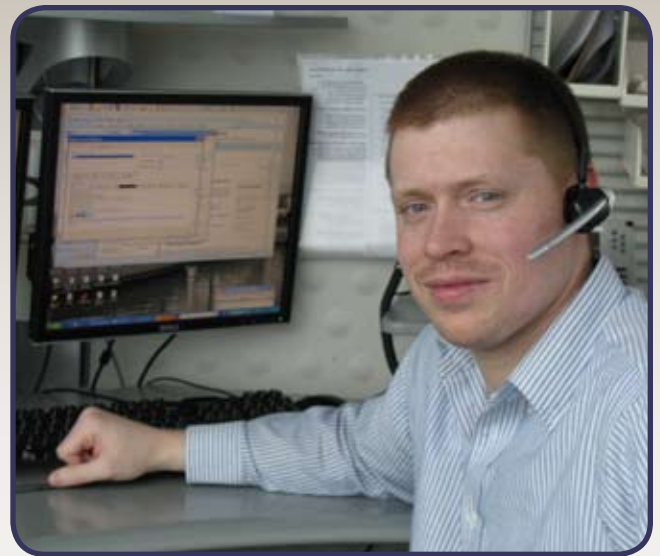
When Winn uncovered interested prospects—usually MSPs that either didn't offer remote data backup or weren't satisfied with their current backup provide—he passed them to the Intronis sales staff. Winn was responsible for meeting daily benchmarks set jointly by Intronis and OpenView, including at least 10 conversations with decision-makers and at least two new qualified sales opportunities.

Intronis received weekly and monthly reports detailing Winn's progress. Meanwhile, Winn continued to refine his approach and skills with continued support and coaching from the OpenView team. "It was incredibly exciting watching those leads turn into sales," he says.



"OpenView's model is built around contributing significant operational value add in areas where portfolio companies need help and support."

**Kobie Fuller**, Senior Associate,  
OpenView Venture Partners



**Eric Winn**, Channel Account Executive, Intronis

### FOUR MAIN COMPONENTS

#### 1. STAFFING

Hiring a highly motivated results-oriented **lead qualification specialist** (LQS), led by an LQS manager who defines and monitors performance while motivating the LQS

#### 2. EXECUTING

Training the LQS team on core product features and functions while also analyzing competitive advantage and role-playing through call scripts; **delivering leads** by prioritizing and planning campaigns; and **prospecting effectively**

#### 3. MEASURING

Developing metrics, including process metrics (conversion rate, number of new opportunities created, etc.) and individual metrics (activities per day, dollar value of opportunities created, etc.); **creating automated reports and dashboards**

#### 4. MANAGING

**Setting expectations** of LQS and management and **holding periodic reviews** to identify impediments and provide feedback and coaching



“We now have a scalable, powerful process to help us generate sales consistently—it’s part of our DNA.”

**Eric Webster,**  
Vice President of  
Sales and Marketing,  
Intronis

## Prepare your venture for its next leap in growth.

To learn more about the Business Development Model—and how OpenView Venture Partners can accelerate your success—contact OpenView directly at **(617) 478-7500** or email [info@openviewpartners.com](mailto:info@openviewpartners.com).

## Success That’s Measurable and Scalable

From August 2009 through November 2009, 30 leads Winn qualified became new accounts for Intronis. Gutmann says the firm’s sales to the MSP market more than doubled in 2009, even though the business-development strategy wasn’t instituted until the summer. “In 2010, we expect sales to MSPs to increase at least 150% more,” he says. “The plan OpenView put into place has helped us become laser-focused in that business segment.”

In fact, the plan was so successful, Intronis promoted Winn in December 2009 to a channel account executive, responsible for closing sales as well as qualifying prospects. Meanwhile, OpenView identified two new people to perform outbound lead generation as LQs for Intronis, and soon plans to add two or three additional LQs to the team.

“We now have a scalable, powerful process to help us generate sales consistently—it’s part of our DNA,” Webster says. “Our goal is to grow very large, and OpenView is providing the operational expertise to help us get there. The next 24 months will be very exciting for us, and we couldn’t be more pleased with our partnership.”

