



Delivering return on marketing and sales.

CORPORATE OVERVIEW



“What happens to leads once they are forwarded to sales? Your guess is as good as mine.” – Marketing Manager, Fortune 500 Tech Company

“I’m sick and tired of getting garbage leads from marketing.”
– Sales Manager, Manufacturer

“We have a ton of leads in our database just sitting there, and nobody is doing anything with them. What’s the point?”
– Marketing Operations, Financial Services Firm

“Can somebody, anybody around here tell me what kind of return we get for all the money we spend on marketing? Wouldn’t we be better off spending it elsewhere?” – Executive, High Tech Software Start-up

Sound familiar? If one or more of the statements above rings true, don’t worry. You’re actually “normal” and experiencing the same issues that so many B2B companies face today. Complicating the issue even more are three things - new technologies, social media and the new dynamic of the B2B buyer -- one where they have more control than ever on the sales process.

A fundamental shift is needed in the way we handle leads. Mass blasting the entire database or routing to sales every “lead” that raises their hand in response to an offer results in frustrated and wasted time for all involved. More importantly, it could be costing your company thousands, even millions of dollars. Something has to change and it starts by addressing your lead management process. Only through developing and implementing a Lead Management Framework™ will you be able to address these issues and achieve a measurable return on marketing and sales.

MISSION

THE ANNUITAS GROUP’S MISSION IS TO HELP OUR CLIENTS INCREASE THE RETURN ON THEIR MARKETING AND SALES INVESTMENTS AND IMPROVE EFFICIENCIES BY DEVELOPING AND IMPLEMENTING EFFECTIVE LEAD MANAGEMENT PROCESSES. OUR PROVEN AND PROPRIETARY METHODOLOGY, THE LEAD MANAGEMENT FRAMEWORK™, HELPS CLIENTS ALIGN THEIR SALES AND MARKETING ORGANIZATIONS TO UNCOVER GAPS AND OPPORTUNITIES FOR IMPROVING LEAD MANAGEMENT, IMPLEMENT CLEARLY DEFINED STEPS AND PROCESSES WITHIN YOUR ORGANIZATION, DEVELOP ONE-TO-ONE RELATIONSHIPS WITH PROSPECTS AND CUSTOMERS, AND TRACK AND MEASURE THE EFFECTIVENESS OF CAMPAIGNS.

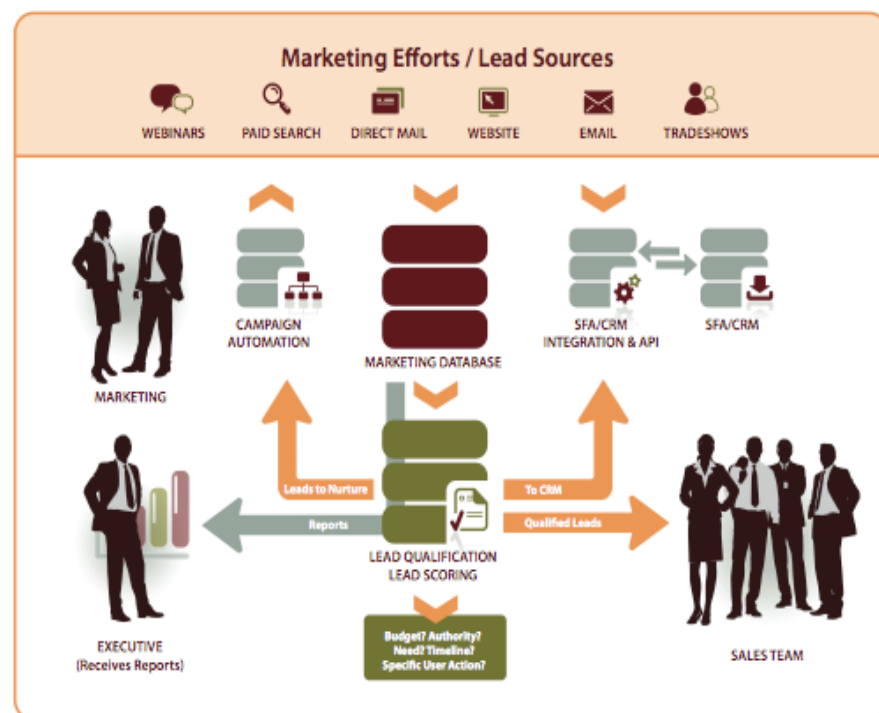
LEAD MANAGEMENT FRAMEWORK

So what is lead management? Simply put, it's the PROCESS of receiving, qualifying, routing, and closing sales leads. This is about quality not quantity; it's about focusing on the entire sales funnel instead of just filling the top of it. Adding more leads to a broken process only heightens the problem. And lead management is not about deploying new technologies. Technology that promises greater efficiency, economy of scale and increased productivity is compelling, but often cause companies to fast forward past the critical phase of auditing the real problems in their business process. True success will only be achieved by developing and implementing a holistic lead management practice.

The Annuitas Group Lead Management Framework™ consists of seven distinct, but connected components that orchestrate the lead management process. They are...

DATA	A defined process that governs data use, access, storage, hygiene and segmentation.
LEAD PLANNING	A documented quota of qualified leads that marketing delivers to sales, aligning the organization around a common goal.
LEAD QUALIFICATION	A set of written definitions for every step in the lead funnel (from response to closed sale). Additionally, determining the qualification criteria for each, and assigning a numerical value, or lead score.
LEAD ROUTING	Process mapping to determine how qualified leads will be sent to sales; how non-sales ready leads will be nurtured; and how sales will send not-ready-to-buy leads back to marketing.
LEAD NURTURING	The development of campaigns for every level of buyer (from prospect to customer) to move them through the buying cycle from purchase to retention.
CONTENT BLUEPRINT	The process of developing a blueprint plan for both offer mapping and content development for each stage of the buying cycle.
METRICS	A process that dictates what will be measured, who is responsible for the measurement, and how the analysis of the metrics will be used for shaping future marketing and sales planning.

"NOTHING IS MORE IMPORTANT THAN PROCESS WHEN IT COMES TO BUILDING A BEST-IN-CLASS LEAD MANAGEMENT ENGINE."
- ABERDEEN GROUP



THE ANNUITAS GROUP'S SERVICE OFFERINGS

We have a lead, now what? Recent research by Gartner, Aberdeen Group and other analysts confirm that creating a documented, standardized lead management process is the fastest way to increase marketing and sales effectiveness. We know this is no easy task. That's why The Annuitas Group has created six distinct service offerings to assist you in every phase of evaluating, developing, implementing and executing a Lead Management Framework™. Each service offering is comprised of a proprietary methodology that helps you:

- Create alignment between your marketing and sales organizations
- Identify the gaps and opportunities for improving lead management
- Implement clearly defined steps and processes within your organization
- Develop metrics to report campaign success and benchmark future campaigns

1 LEAD MANAGEMENT AUDIT

It's hard to solve a problem without knowing the nature of the problem, or where it exists. The Annuitas Group Lead Management Audit™ helps clients "know what they don't know" by walking through and examining every piece of the Lead Management Framework. To achieve this, we conduct extensive interviews with stakeholders – marketing, sales, ops, finance, executives, etc. During the process, we immerse ourselves in every aspect of your programs – from reviewing current marketing campaigns, to identifying what marketing and sales technologies are being utilized (like marketing automation or CRM solutions), to understanding your company's sales process. The result is a detailed list of gaps and recommendations that ultimately creates a plan for implementing the Lead Management Framework.

2 LEAD MANAGEMENT FRAMEWORK IMPLEMENTATION

Like most B2B companies, you're probably resource and time-constrained and need experienced assistance to implement the comprehensive set of recommendations made via the Lead Management Audit. That's why we've created the Lead Management Framework Implementation™ service offering. It prevents any time from lapsing after the conclusion of the Lead Management Audit, allowing your organization to immediately start developing a new lead management process. In this role, The Annuitas Group serves as an extension of your team. As the project leader, we work with your organization to implement the necessary fixes identified in the audit. The Annuitas Group leads meetings, works with marketing and sales stakeholders, and interacts with vendors to make sure that new processes are defined, developed and installed.

3 LEAD MANAGEMENT ADVISORY SERVICES

After the implementation of the Lead Management Framework, some companies choose to benefit from ongoing, third party insight and expertise on lead management issues. Call it a "checks and balances" or even an "expert on call." With Lead Management Advisory Services™, The Annuitas Group helps you continue to mature your marketing and sales lead management process. Through regular reviews, meetings and working sessions, we assist in maintaining "best-in-class" status, upholding a measurable impact on revenue and enhanced ROI.

4 MARKETING AUTOMATION SELECTION SERVICES

Many B2B marketers today know that marketing automation technology provides the means to be more efficient and more effective. However, with over 100 providers of this still evolving technology, many are confused as to where to start when selecting the right vendor. To help, The Annuitas Group provides Marketing Automation Selection Services. Through this service, we help you weed through the complex process of selecting a vendor from beginning to end. This includes reviewing your current lead management process (and any potential gaps), defining process and technology requirements, identifying potential vendors, scheduling demos, securing pricing, and making recommendations on final vendor selection. And because we are vendor agnostic (we do not take referral commissions from any vendor), we can be truly objective on our clients' behalf. The end result is confidence that your organization has selected the right marketing automation partner.

5 MARKETING AUTOMATION OPTIMIZATION SERVICES

While The Annuitas Group recommends establishing a lead management process first, we realize that many B2B companies alternatively invest in a marketing automation solution. What you may soon realize, however, is that technology is not a quick fix for marketing issues. Instead marketing automation can actually magnify and bring to light the underlying problems that originate from a lack of process. With our Marketing Automation Optimization Services™, The Annuitas Group works side-by-side with your marketing automation stakeholders to implement the six areas of the Lead Management Framework. Like our other implementation services, we become a virtual member of your team to ensure your organization is maximizing your marketing automation investment and utilizing it to bring efficiency to your lead management process.

6 LEAD MANAGEMENT WORKSHOP

Sometimes the idea of full-blown lead management process change is too much for companies to grasp. Obstacles such as budget, executive resistance or lack of resources can hamper even the best-laid plans for process change. That's why we created the Lead Management Workshop™. In this one and a half day workshop, The Annuitas Group leads marketing and sales stakeholders through a high level audit of current processes within the Lead Management Framework. After the workshop, The Annuitas Group consultants will review the findings with key stakeholders, providing a starting point for enabling change and transformation within your organization.

WHY THE ANNUITAS GROUP?

Unlike service providers that talk about Lead Management Process so they can sell other products and services, The Annuitas Group talks about Lead Management Process because that's all we do. With a team that has 60+ years of lead management process experience and expertise, The Annuitas Group serves Fortune 100 clients, as well as medium sized companies. As results driven company, The Annuitas Group has helped its clients identify more than \$500M in revenue as a result of the Lead Management Audit, and our clients regularly achieve increases in marketing ROI and sales productivity. Perhaps we can do the same for you.



CONTACT US

TO FIND OUT HOW THE ANNUITAS GROUP CAN HELP YOU ACHIEVE GREATER RETURN ON MARKETING AND SALES BY IMPLEMENTING A LEAD MANAGEMENT FRAMEWORK, CONTACT US AT:

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