

Lead Generation

A Rewarding Relationship Building and Communications Project

January 2010

William Anderson

347-694-5202 | william@andersonjr.com

andersonjr.com | [@wiljr](https://twitter.com/wiljr)

Table of Contents

Me, Briefly	4
Overview	5
The Planning	6
Goals and Metrics	6
Contact Management	7
Unique Email Campaigns	8
Delivery	9
Travel schedule management	9
Contact management and follow up	9
The Results	11
The Conclusion	12

Me, Briefly

I am a marketing guy. Coupled with technology, that's what I do. From [creation to management](#), with lots of collaboration in between. I like to get the word out, and discover which method is the best. That helps me, help you.

I live in New York, but I work all over. The web allows that, along with lots of personal communications. My site shows I've done work in Sydney, Australia to London, UK and all points between.

I started [my blog](#) as a discussion of how to run a business without making enemies. All people we come in contact with - customers, competitors, vendors, employees, recruits, etc. - should be viewed as long-term partners. Never easy, but always worth the effort.

My professional experience includes a unique blend of marketing, technology, finance, business development, and sales. I've worked with growing and fun firms, with positions including Network Administrator, Equities / Investment Banking Analyst, Business Development Manager, Product Management & Business Development, VP, Sales & Marketing, and Director of Marketing.

My experience and skills have helped me put together the following list of key competencies:

- Implementing and managing business communication and collaboration practices
- Mentoring and motivating internal and dispersed teams
- Designing and delivering marketing campaigns based on measurable results
- Ability to succeed in diverse and flexible work environments

My education experience includes an MBA, Marketing and a BS, Business Computer Telecommunications.

For fun, I like to do anything with my wife and anything in New York. We love to travel, and hopping on a train east, west, north, or south is always adventurous and welcome. I'm a big fan of soccer and support the following clubs/teams:

- [Liverpool FC](#)
- [New York Mets](#)
- [Cleveland Browns](#)

Oh, I enjoy writing, too.

Overview

Our team presented at a vendor's conference in San Francisco, CA. In addition to the steps involved in presenting an attractive booth, designing and printing conference materials, and managing the company's event logistics, I decided to enhance my time in California by meeting with current and prospective clients throughout the state. This sales and marketing outreach initiative was intended to accomplish the following goals:

- A direct marketing push to those clients in specific geographical areas
- A direct sales opportunity to clients needing additional services and products
- A direct marketing opportunity to introduce company to potential clients
- A direct sales opportunity to introduce services and products to potential clients

After conceptual and detailed meeting and sales metrics were finalized, I set out to plan my communications strategy for meeting with a concentrated list of contacts in a relatively short amount of time. This included drafting email messages, posting updates to the internal corporate site, and creating quick reports for the organization to follow during my trip.

The meeting metrics included a specified number of confirmed meetings with current/potential clients and current/potential partners. The sales metrics included goals for both product sales and service engagements with current and potential clients. The idea was to meet with clients and listen to their requests, bring potential clients up to speed with the company's product updates and service roadmaps, and to develop and build deeper relationships with partners.

Although a short time line, this was an ideal opportunity for face time with our clients and partners, and provided the perfect venue for engaging new prospects and partners.

The following is a study on the success and challenges faced managing a marketing campaign to increase sales while making efficient use of time during a remote event.

Company Overview

- Established in 2001
- Based near Washington, DC
- SDLC-focused services
- Software integration products
- Lean operating structure
- Remote workforce
- Exceptional customer service

The Planning

Planning is the most challenging, and most important, piece of the entire project. Having a plan in place at the outset will act as a:

- Gauge for success or failure
- Reference for future projects
- Timeline to help plan other ongoing plans
- Guide to fall back on when it gets busy

The project plan had the following sections:

- Create goals and metrics to base rate of success
- Contact management and segmentation
- Draft emails based on four unique campaigns
- Create email delivery schedule
- Travel schedule management
- Contact management and follow up

These sections are described in more detail below.

Goals and Metrics

The first piece of the plan was to establish some parameters around what would make this outreach a success. The following three, quantifiable goals were developed:

- Schedule meetings with at least 15 firms
- Generate near-term sales (products and/or services) with at least five firms
- Establish relationships that will likely result in sales with at least five firms over the next six months

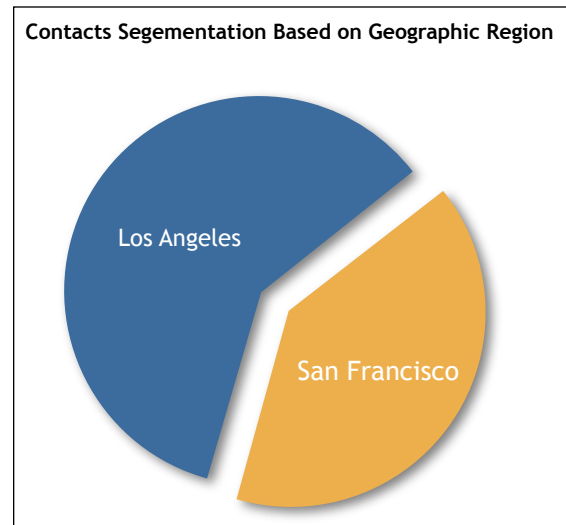
Once these goals were established, a timeline was drafted for the entire project. The timeline helped to provide an understanding of when to send out specific messages, when to book travel arrangements, and when to provide internal updates to the company. A calendar and news feed were created on the company's internal collaboration space where updates were posted regularly, providing colleagues the

ability to follow along and provide comments as needed. This helped increase communication and understanding during the entire project.

Contact Management

Next, we needed to review the lists of contacts and segment them into different groups. These contact groups would then help define the email message that would be drafted later. The first contact segmentation phase was based on geographic region:

- Southern California, within a 25-mile radius of Los Angeles
- Northern California, within a 40-mile radius of San Francisco



The criteria for the first segmentation was chosen on familiarity on the area and the concentration of clients and customers. Northern California was more familiar and easily accessible via public transportation where Southern California would require a rental car and adequate driving time between meetings.

Once the first segmentation was completed, the contact groups were divided into four sub-groups:

- Current customers and clients with a close working relationship
- Current customers and clients with a general working relationship
- Prospective customers and clients
- Current and prospective partners

Compiling the current contacts were simplified through the use of customized reports within an internal customer relationship management (CRM) system. The list of prospective partners, customers, and clients required additional, manual time. This process used in finding prospective contacts included:

- Acquiring a list of publicly traded companies
 - The list included multiple sources
 - Publicly traded companies provided current/relevant corporate addresses
 - Publicly traded companies provided current/relevant contacts
- Importing the list into a spreadsheet
- Massaging the company data for consistent patterns

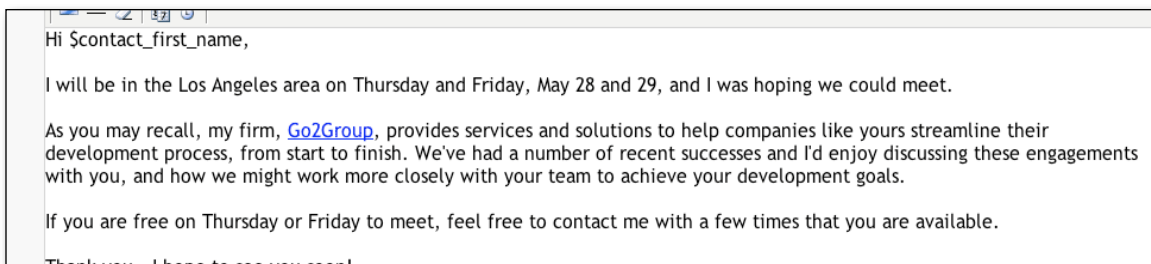
- Devoting columns for city, state, phone number, zip code, website
- Helped to segment the contacts into geographic region
- Helped to derive email addresses when none publicly existed
- Exporting the finalized list into a CRM-importable format
- Importing the list of contacts into CRM leads

In addition to the contacts above, personal channels were explored in an effort to extend this list and to make the trip as successful as possible.

Unique Email Campaigns

Next, several different email messages targeting the different contacts were drafted. Each of these emails were crafted with the same core message, and tweaked slightly depending on which group they fell into. These groups included the four contact segments listed earlier, with a fifth group based on those contacts not heard from:

- Current customers and clients with a close working relationship
- Current customers and clients with a general working relationship
- Prospective customers and clients
- Current and prospective partners
- Follow up emails for each category above that I have not heard back from



Example Email Message Template to Clients/Customers

Delivery

Emails were scheduled to be delivered at different times of the day to better manage the results from each mailer. This continued contact management included removing contacts whose emails were no longer valid or those who opted out of future mailers.

Each mailer was delivered within two hours of each other. This provided enough time to review the mailer statistics and make any contact updates needed.

Travel schedule management

Once the process of delivering these emails began, the process of managing the travel schedule began - shuffling meetings depending on where a meeting was located. The initial rush of meeting requests allowed a basic structure for the trip, and additional requests were added to the calendar as their schedules were made available.

Contact management and follow up

The nature of email campaigns dictate the contact management process continues throughout the campaign and beyond. Part of this process is to follow up with those contacts who had not responded to the initial mailer, requesting a response in a follow up email message that includes the original email.

I wanted to check back in to see if you were available to meet with me during my trip to Los Angeles next week. If you are free on Thursday or Friday, May 28 or 29, for a quick discussion, I'd be glad to meet with you.

Feel free to propose a few times that work with your schedule and I'll join you then.

Thank you!

William

William Anderson
Go2Group, Inc.
347-694-5202
www.Go2Group.com

Begin forwarded message:

From: "William Anderson"
To: "Scontact_name"
Date: May 11, 2009
Subject: Go2Group in Los Angeles May 28, 29 - Can We Meet Up?

Hi Scontact_first_name,

I will be in the Los Angeles area on Thursday and Friday, May 28 and 29, and I was hoping we could meet.

As you may recall, my firm, [Go2Group](http://www.Go2Group.com), provides services and solutions to help companies like yours streamline their

Example Email Message Template (Fwd'd) to Clients/Customers

With two weeks remaining until the flight to California, those folks who had not responded to the initial mailer were contacted again. Since a follow-up email had already been created, this was a simple task of ensuring those contacts that had either declined or scheduled a meeting were removed from the follow up list. This contact management was completed using our CRM application.

The Results

The total number of contacts emailed was roughly 100. Of these contacts, 20 meetings were scheduled outside of the conference, roughly 20 people at the conference, and 10 phone calls scheduled while in the area. These meetings included stops in Los Angeles, Hollywood, Santa Monica, Irvine, Anaheim, Oakland, and San Francisco.

In addition to these scheduled meetings, other meetings were scheduled with personal contacts with like-minded interests and after-conference meetings that were scheduled on an ad-hoc basis.

Along with these sales-related meetings, several potential partner meetings were arranged at the conference, many of which have resulted in deeper discussions and a partner-focused program being assembled to address an increasing number of partner-related inquiries.

As for the defined goals and metrics, each near-term goal was surpassed and the longer-term goals are working towards next steps. For example, several contacts have expressed interest in engaging service-related contracts.

This outreach accomplished many different goals. In addition to those metrics defined above:

- **Business Development** - I was able to meet with potential partners in person, providing thoughtful discussions to expand each other's market. These discussions included OEM, resell, strategic, and technical partnerships.
- **Marketing** - Meeting with customers and clients in person extended our brand equity and goodwill from web, email, and phone discussions.
- **Sales** - By meeting with current customers and clients, an interest in their triumphs and concerns was established, and we were able to discuss potential opportunities.
- **Contacts** - Additional contacts were added to the internal CRM system, while others were updated dependent on contact requests or current statuses.

The Conclusion

The campaign was deemed a success in both the near-term and longer-term. Since the San Francisco area is home to many technology companies and software-based conferences, the geographical-focused mailer will help future trips to the Bay Area. In addition, the Los Angeles-focused mailer has helped make those contacted firms aware of an alternative firm for their software development needs.

To complement the email campaigns, supplemental campaigns were run over the course of two months. These other campaigns included:

- Conference and local meeting requests were included in monthly newsletters
- Regular blog posts announcing conference-related activities
- Twitter discussions with customers

Finally, the mailer helped cleanse the company's contact list, improved company messages to customers, enhancing the process of reaching out to many contacts with a specific message.