

THE STATE *of* LEAD MANAGEMENT

2017

A Survey of B2B Sales &
Marketing Professionals

Leads are the lifeblood *of* every business.

B2B companies spend an enormous amount of time, energy and resources gathering the leads that power their revenue-generation engines. But once organizations have accumulated those precious leads, what are they doing to get them to the right team member for the best follow-up?

That question was at the heart of The State of Lead Management survey. [LeanData](#) wanted to gain a better understanding of how businesses manage their leads for success, and the **results were eye-opening**. The state of lead management, in fact, is not strong. A majority of **527** sales and marketing professionals indicated they have serious doubts about the effectiveness of their lead routing process. The findings from respondents revealed profound concerns in two critical areas:

✓ CUSTOMER EXPERIENCE

- More than **57 percent** expressed doubts that their lead workflow is creating an ideal customer experience – making the buyer’s journey as seamless as possible
- Almost **80 percent** of respondents said they are not completely satisfied with their current method of routing leads

✓ PRODUCTIVITY ISSUES

- One out of every four leads, on average, is assigned inaccurately
- Less than **34 percent** said sales *always* follows up on marketing-generated leads
- About **38 percent** wish they had the ability to connect leads to accounts within the Salesforce CRM

“It’s mind-boggling that so many businesses feel like they’re not having quality interactions with their customers,” said [Christine Maxey](#), director of enterprise solutions at LeanData. “That should be terrifying. What this survey uncovered is that the problem is not unique. It’s widespread and businesses are aware that they haven’t yet figured out their lead management challenges.”

As one survey respondent wrote: “I know this can be a struggle for a lot of organizations.”

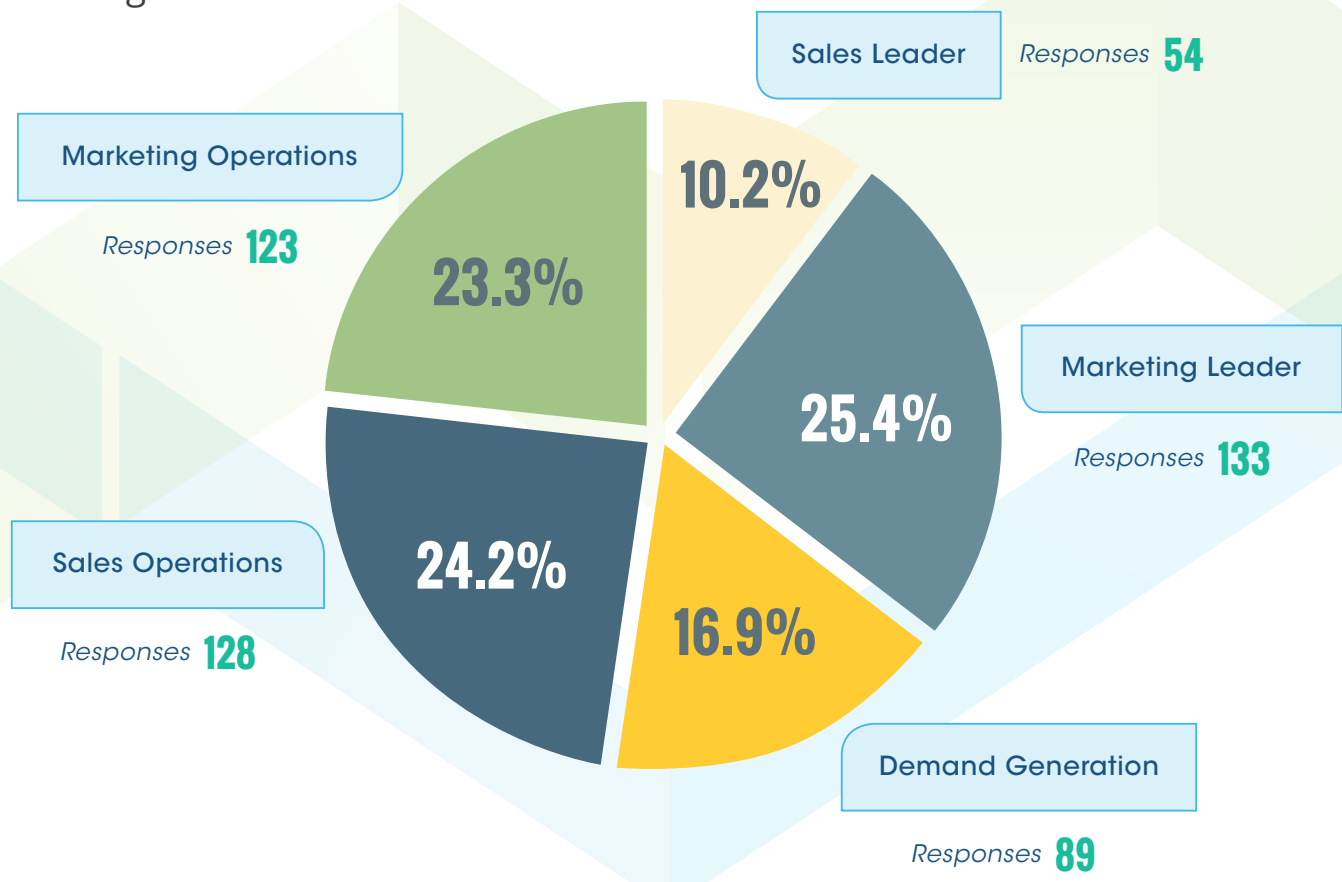
That appears to be an understatement. Here is a closer look into the results.

“Businesses are aware that they haven’t yet figured out their lead management challenges.”

What is your job role?



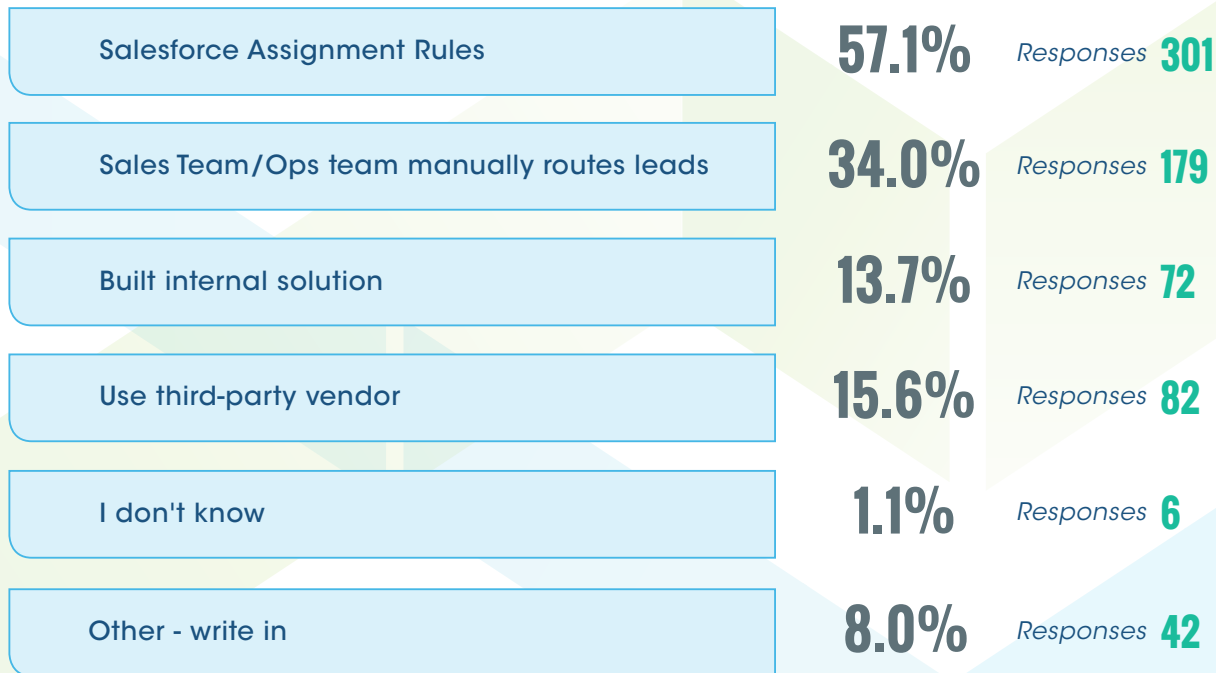
KEY TAKEAWAY: What makes the results both insightful and significant is the large number of respondents across B2B sales and marketing – in leadership roles as well as at the practitioner level. In total, **65 percent** came from marketing and **35 percent** represented sales. The response to the survey also indicates the high level of interest in understanding more about lead management.



How does your business currently route leads? (Choose all that apply.)



KEY TAKEAWAY: A majority of survey-takers said their businesses (**57 percent**) are still relying on Salesforce’s standard if-then statements and/or are manually routing (**34 percent**) leads. This is significant because both of these lead-assignment methods are labor-intensive and prone to errors.



Do you believe your current lead routing process creates an ideal customer experience?



KEY TAKEAWAY 1: An “ideal customer experience” simply means ensuring the right person in your organization is engaging with a prospect to provide the best information at the right time. Sounds simple, right? Business leaders know that it’s actually quite difficult – especially in complex sales life cycles. The potential for mistakes is endless. Multiple reps engage the same lead. Existing customers accidentally are prospected. Red-hot leads are sent to a holding queue where they grow cold. This helps explain why **35.3 percent** of respondents answered a definitive “no” about creating an ideal customer experience. Meanwhile, the **22 percent** of respondents who said “not sure” indicates a lack of awareness about how leads are managed in their organizations.



KEY TAKEAWAY 2: Just **40 percent** of sales and marketing operations respondents – the practitioners responsible for maintaining the revenue-generation process – believe their workflow crafts an ideal customer experience.

YES

42.9%

Responses **222**

NO

35.2%

Responses **183**

Not sure

21.9%

Responses **114**

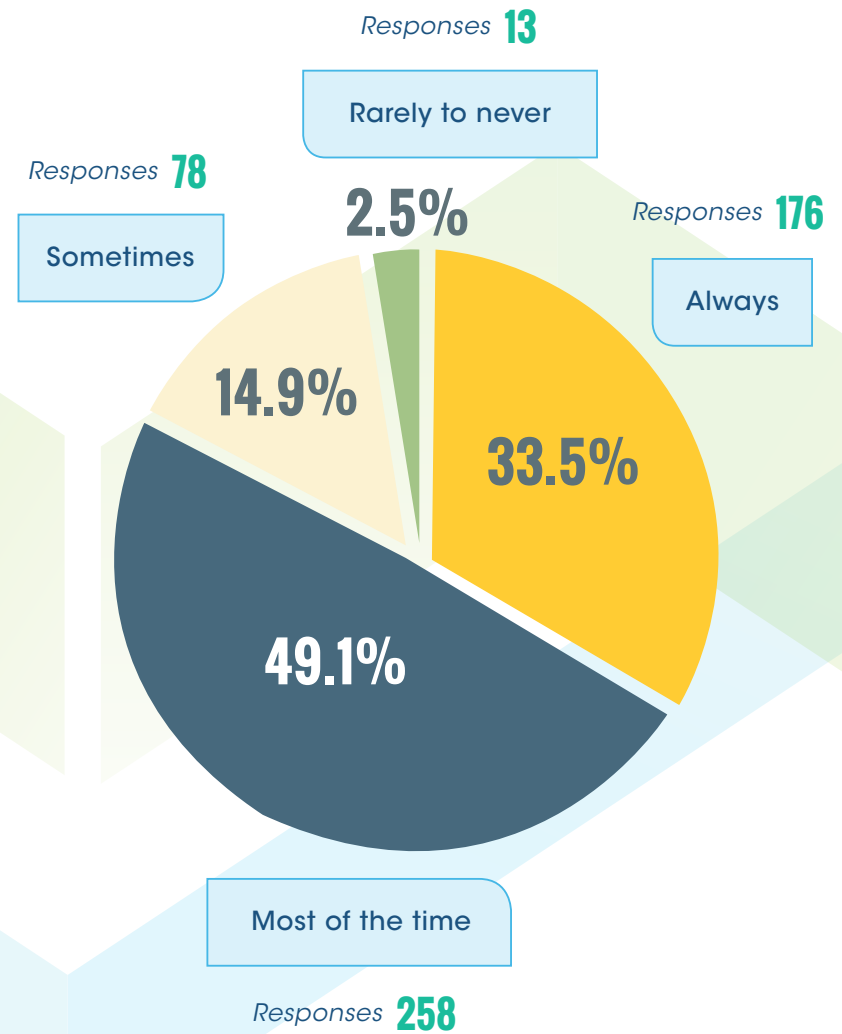
Does sales follow up with marketing-generated leads immediately?



KEY TAKEAWAY 1: That less than **34 percent** said sales always follows up on leads will likely bring tears to the eyes of marketers. Even more disheartening, a combined **17.4 percent** of respondents said that sales responds to leads only “sometimes” or “rarely to never.”



KEY TAKEAWAY 2: There was a clear disparity between how sales and marketing leadership view lead response. Of sales leaders, **61 percent** said their teams always follow up on marketing-generated leads. But only **30 percent** of marketing leaders said they believe sales always follow up their leads.



How often are leads assigned to the wrong owner?



KEY TAKEAWAY: Respondents said that, on average, they believe **one out of every four** leads is routed to the incorrect account owner. This means sales reps must spend part of their day reassigning leads to the correct person. Or they may do nothing at all – letting those leads wither and die. At best, this is a productivity issue for the sales reps as they do busywork rather than focus on selling. At worst, money is being left on the table as leads fall through the cracks.



Do you believe your sales and marketing teams are properly aligned to achieve your business goals?



KEY TAKEAWAY: Nearly half of respondents said the teams either are not aligned, or they're not sure. This highlights the age-old divide between sales and marketing. In the context of this survey, it also suggests that a key technical challenge to alignment is an inability to route leads to correct person within an organization. It could be that the traditional complaint from sales that marketing is generating poor-quality leads misses the point. Instead, it might be that good marketing leads simply aren't reaching the correct sales reps for timely, engaging follow-up.

YES

52.3%

Responses **275**

NO

41.1%

Responses **216**

Not sure

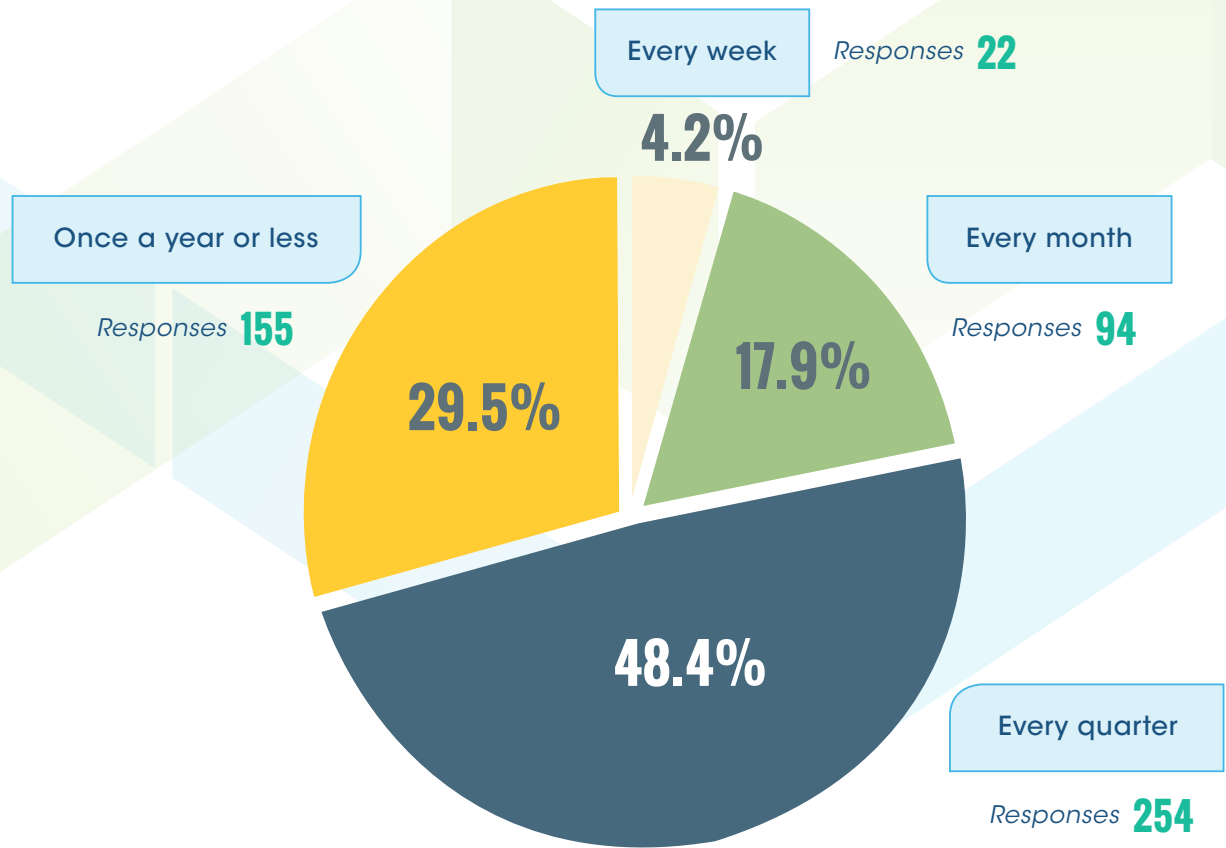
6.7%

Responses **35**

How often do you need to change your lead routing rules?



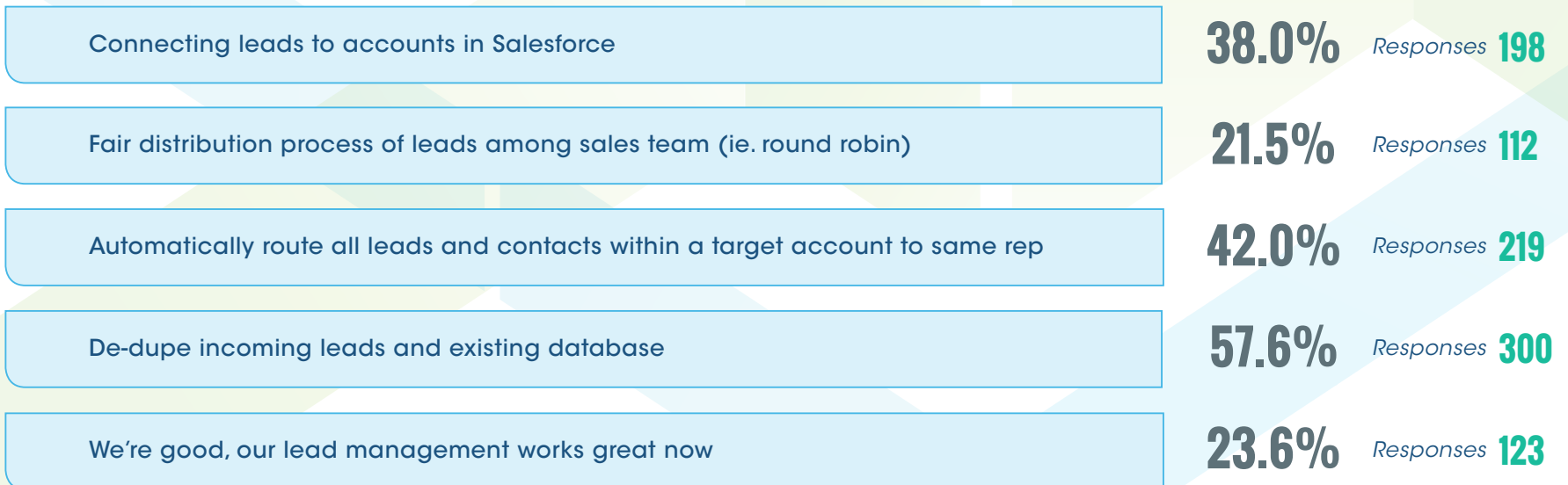
KEY TAKEAWAY: **Almost half** of respondents said they make routing changes every quarter. That's logical considering the start of a new quarter is the customary time to pause, evaluate and consider adjustments such as modifying territories. But **almost one-third** said they make changes on a much longer time frame – sometimes only annually. That suggests the lead management process is not keeping pace as fast-growing companies evolve.



What lead management capabilities would you like to have, but currently do not? (Choose all that apply.)



KEY TAKEAWAY: The wish list is long when it comes to increased functionality. But the key statistic from this question is that less than **24 percent** of survey-takers said they believe their current lead management process “works great.” But some of those respondents also indicated that they *do* want some additional lead management capability. So the true number of people who actually are satisfied with their process is just **20.5 percent**. That strongly suggests that there’s plenty of room for lead management improvement.



Any other comments about challenges in lead management? (Sampling of Responses)

"Lead-to-account matching is (a) serious struggle."

"We have a lot of data that needs to get passed from a lead to an account once it's closed, and I don't think that's happening due to how Salesforce works."

"I wish there was a better way to alert sales/ SDRs when there's been activity and they need to follow up. Newly created leads are straightforward. But for existing contacts and leads it's more challenging."

"It's very manual for us."

"Automation would be the key. Currently we have an employee that evaluates leads manually."

"Many inaccuracies in the routing process provides territory conflict between Sales Reps. Furthermore, we cannot connect analytics to the KPI's due to inaccurate reporting."

"High turnover among reps has created a lot of dead rules that go nowhere and dump into a catch-all."

"Biggest challenges are existing customers downloading our content and popping back in as leads, even though they are already contacts in the system."

"Data inaccuracies are frustrating, as are when companies don't match properly based on email address."

"Being able to go beyond known IP address for behavioral leads would be a big plus."

"Solving lead to account matching issues is a huge priority for us right now."

FINAL THOUGHTS

This survey revealed the depth of concern that B2B professionals have about the efficiency of their lead routing process, and how it might be affecting productivity. For LeanData's Maxey, the finding that represents the biggest red flag is how more than **57 percent** of respondents questioned if their current workflow is creating an ideal customer experience.

"That's really unacceptable," she said. "You believe that more than half the people you interact with are not happy? How could you not want to take steps to improve that number? Here's the reality: sales and marketing don't get to decide what is a quality interaction. The customer decides."

Businesses invest heavily in lead generation and enrichment. But it's evident from these results that leaders are worried about their ability to extract the full value of every lead by ensuring that the right people in their organizations are executing the follow-up.

"The survey clearly shows that people are having a problem," Maxey added. "They're not ignoring the issue. They just don't think there's an easy fix for it, so they're doing the best they can. But you should never be satisfied when it comes to customer experience because choice is king in the SaaS world. Businesses always have options when it comes to vendors and solutions. You always have to focus on quality interactions."

Business leaders are worried about their ability to extract the full value of every lead.

About LEANDATA

LeanData's best-in-class solution simplifies the complexity of the B2B sales process through intelligent lead management. LeanData makes revenue-generation teams more successful by matching leads to accounts and then automatically routing them to the right rep, every time. More than 250 fast-growing businesses such as [Nutanix](#), [Palo Alto Networks](#), [Marketo](#) and [Cloudera](#) use LeanData to maximize marketing ROI and close more deals.

Learn more at leandatainc.com