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How to Qualify Leads with Targeted Online Surveys

SUMMARY

Sales reps armed with plenty of information about potential clients can turn cold calls into hot prospects. An IT company used online surveys to qualify leads before they made their first contact.

Includes six steps to help fill the pipeline and gain the most relevant data on your potential customers so you can close the deal. Plus, list segmentation and email follow-up tips.

CHALLENGE

"We had a very specific need to fill the sales pipeline. Our guys had to have enough sales at-bats they can look to in terms of getting to their quotas," says David Appelbaum, VP Marketing, BigFix.

Filling the sales pipeline wasn't just a question of providing loads of prospect names and contact information, however. The technical nature of BigFix's products—enterprise IT security and management infrastructure—required that Appelbaum's team arm their salespeople with as much information as possible about a prospect's computing environment, infrastructure products, pain points and security concerns.

They needed a way to glean specific information from prospects before the sales team made its first contact. With this data, reps could more accurately target certain accounts, speak intelligently about the prospect's needs and, in turn, close more deals.

CAMPAIGN

Appelbaum's team turned to online surveys that polled prospects on specific business challenges and industry trends to uncover key issues they dealt with every day. The idea was to use the online survey as the first sales call. The survey allowed the marketing team to gather information that the sales team could use to have intelligent, relevant conversations with prospects during the first contact.

Here's how they implemented the online survey strategy:

STEP 1. Segment prospect list by customers

Because they sell to a range of industries and companies of all sizes around the world, the team needed to tailor unique surveys to those different segments. "The key to making this really successful is that you need to understand who you are selling to and what their hot-button issues are from the start," Appelbaum says.

The breakdown included:

- High-level IT executives in the US
- Small and medium-sized businesses
- Federal government
- European customers

For each segment, the team focused on high-level contacts, including Directors, VPs and some C-level executives.

STEP 2. Develop survey questions

To encourage participation in the surveys, Appelbaum and his team crafted questions that weren't overtly sales-oriented or directly related to BigFix. Instead, they took a business development approach that asked questions about industry trends, current software and infrastructure implementations, levels of satisfaction with existing security products, etc.

"With high-value prospects, you don't want to put them in a scenario where they feel they're getting sold to. You need to maintain a level of professional detachment," Appelbaum says.

Typical question topics included:

— Whether the prospect has been hit by particular types of vulnerabilities or security breaches.

— What kinds of penalties security managers face for failures.

— Their level of satisfaction with key elements of their security and IT management infrastructure.

— How important different features are to them.

— Their disposition toward a range of security system alternatives.

The final question of the survey asked participants if they'd like to be contacted by a BigFix representative. This served as the opt-in for future communications.

STEP 3. Offer free gift in exchange for participation

Another technique to encourage survey participation was the use of thank-you gifts for respondents. At different times, they offered:

- Columbia fleece jackets
- Tasco binoculars

Appelbaum's team decided not to brand the thank-you gifts with the BigFix name or logo. "We're looking at this process from a long-range relationship standpoint. We're not looking to brand ourselves through schwag. We're looking to brand ourselves through the quality of the conversations we have with prospects."

STEP 4. Send email invitations for survey

Appelbaum used a third-party vendor to conduct the online surveys, collect and sort the data, and handle the first email invitation to their prospect lists (see hotlink below). Although BigFix was named the sponsor multiple times in the process, having the email invitation come from a third-party research organization made prospects less apprehensive about taking the survey, he says.

The email invitation highlighted three key factors:

- Respondents would receive a free gift for participating
- The survey would only take four minutes
- The survey was sponsored by BigFix

A hotlink in the email took prospects to a survey registration page where all their contact and company information was pre-filled into form fields. All that was required to start the survey was to click on the "Continue" button.

STEP 5. Email follow-up to request meetings

Appelbaum's team planned a follow-up strategy that used staggered email messages to prospects that completed the survey.

— As soon as a prospect completed a survey, their Sales VP sent an email thanking them for participating and asking if they would like to schedule a time to speak with a sales representative.

— When the company shipped the thank-you gift, the sales team sent a second email telling respondents that their jacket or binoculars had been shipped. At the same time, they asked prospects who had not yet agreed to a meeting if they would like to schedule a call to discuss the survey results.

— For prospects who still hadn't responded, the team included a thank-you note with the gift reiterating the request for a meeting.

— A week after the respondent received a thank-you gift, the team sent a final note. It said they hoped they liked the gift and asked one more time if a salesperson could speak with them.

STEP 6. Brief sales reps on survey responses

For respondents who agreed to meetings or phone calls, sales reps could access all the necessary contact and company information along with their survey responses.

Using those answers as qualifying information, the reps could structure their first contacts according to the most relevant product needs or pain points identified in the survey.

"The key is, these are very highly placed individuals, and it's hard to get access to an individual like that," Appelbaum says. "You want to make sure that when you're speaking to them you sound intelligent and are not just wasting their time."

RESULTS

The survey was a total hit—"one of our most successful programs on the whole," Appelbaum says.

The surveys are averaging a 6% response rate across different segments. Of those respondents, a vast majority are agreeing to meetings or engaging in some other aspect of the marketing cycle, such as asking for additional marketing materials or visiting the company's Web site for more information.

Appelbaum says he has seen sales from prospects who participated in surveys, but they can't track a direct conversion rate from survey to sales because prospects typically engage in several follow-on conversations and marketing efforts. "We know that we get an initial boost through surveys, particularly in very large, global accounts that we just can't beat."

In addition to filling the sales pipeline, the surveys are helping Appelbaum with his broader, brand marketing efforts. By aggregating survey response data, the company is publishing reports on industry trends. A report BigFix released this summer based on surveys of 450 IT managers received coverage in industry trade magazines, including PC World and InfoWorld.

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Creative samples from BigFix

www.marketingsherpa.com/cs/bigfix/study.html

SimplyDIRECT—the vendor that hosts BigFix's surveys and handles email invitations:

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