



# **BRIDGE THE DIVIDE BETWEEN SALES & MARKETING**

**LEAD GENERATION WITH A HUMAN TOUCH**



By Jeff Kalter  
Co-Founder and CEO, 3D2B



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# YOU CAN GIVE YOUR SALES REPS WHAT THEY WANT...

## AND IT'S NOT ANOTHER “ME TOO” TWITTER PROMOTION OR IRRELEVANT EMAIL CAMPAIGN

It's a list of leads. Sounds simple, right? But we all know how difficult it can be to generate leads. Real leads. We're not talking about a stack of business cards tossed into a fishbowl for a tradeshow giveaway. No. We're talking about honest-to-goodness people who are ready to buy, have the budget to buy, have the authority to buy, and are ready and willing to sit down with a sales rep.

After all, your sales reps are your customers. For B2B marketing execs like you, your most fundamental job is to provide the leads that sales reps can turn into customers.

But what a job that is...



# WHY IS LEAD GENERATION SO DIFFICULT?

B2B marketing organizations across the globe—65% of them to be exact—say that generating high-quality leads is their greatest challenge.<sup>i</sup>

But how can that be when you're on the cutting edge of all the latest social media marketing trends? When your website is an SEO dream? When your mobile app has earned five-star reviews?

Therein lies the problem. Search engines and social media apps don't buy your products and services. People do.

But it's more than that. All of your work to stay on top of the latest marketing technologies may be putting you at odds with your sales reps. They know you struggle with lead generation. And they know you don't always qualify the leads that you do gather. What's more, sales reps can be impatient sometimes. They want leads they can act on now, not next month or next quarter.

In fact, sales reps don't follow through on 50% of the leads generated by their marketing departments.<sup>ii</sup> Pretty bleak, huh?



# WHAT CAN YOU DO ABOUT IT?

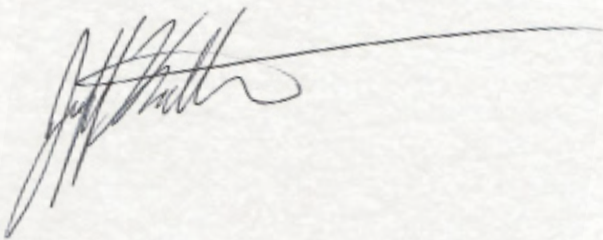
For starters, read this e-book. Learn about the sales lead black hole. Understand why lead scoring alone doesn't work. Gain a new perspective on how our always-connected world is actually disconnected. And learn how outbound efforts, primarily tele-services, can bring the desperately needed human touch to your lead generation efforts.

Certainly, your inbound, technology-driven efforts have a place in B2B marketing. But you can't stop there. Your lead generation must be focused on an effort to establish relationships and use the face and voice of your brand to do so.

It's all about connecting human beings with other human beings and not letting a computer screen get in the way.

And then, when you use a qualification system centered on BANTS criteria (budget, authority, need, timing, solution), you can ensure that every lead you hand off to sales has the real potential to turn into a deal.

Give sales reps the leads they can call on with confidence. And if you do, they'll see you not as the opposition or a disinterested third party, but as a valuable member of their team.

A handwritten signature in black ink, appearing to read 'Jeff Kalter', with a long horizontal line extending to the right.

Jeff Kalter, Co-Founder and CEO  
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# THE SALES AND MARKETING DIVIDE

## INTERNET + POWER SHIFT = MISALIGNED OBJECTIVES

We get it. Times have changed. The Internet has shifted power. It used to be that a sales person could call a prospective buyer, ask for a meeting, and sit down with his trusty sales brochure and PowerPoint deck. Sales and marketing held great sway in the buying decision.

Fast forward 15 years. Today's savvy, educated, overworked buyers won't even talk to you until they have completed nearly 57% of the buying cycle.<sup>iii</sup>

This means that sales and marketing execs have to work that much harder to gain buyers' attention. Many times, their efforts are completely misaligned. And this misalignment will only continue as trends in digital marketing grow and as sales teams are pressured to close deals.

Meet Mary,  
VP of Marketing,  
Acme, Inc.

What's her focus?

- Social Media
- Content Marketing
- Marketing Automation
- Mobile Marketing
- Search Engine Marketing



Meet Steve,  
Sales Manager,  
Acme, Inc.

What's his focus?

- The Next Sale
- Beating Quota
- Getting That Big Meeting

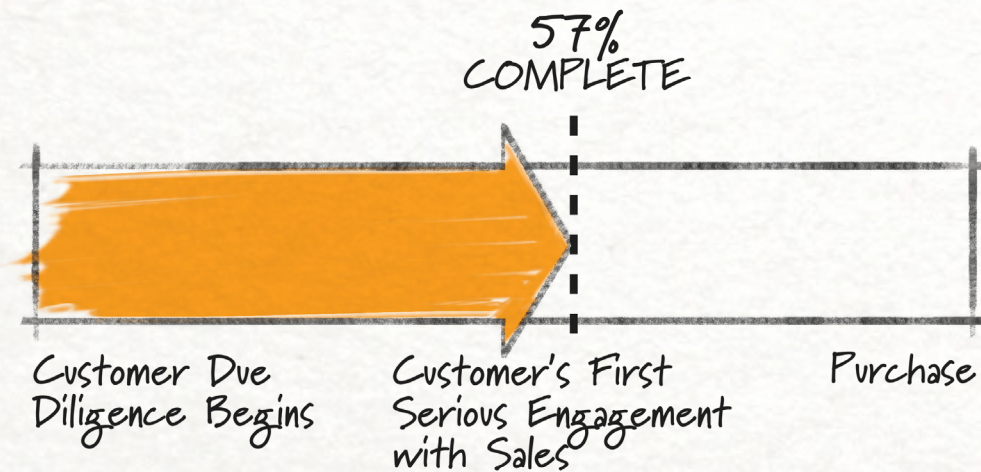




# THE INTERNET CHANGES EVERYTHING

*A 2017 study by Accenture Strategy states that “Most customers are 57% through the buying process before the first meeting with a company representative.”<sup>iv</sup> That means they’ve been—researching solutions, ranking options, setting requirements, benchmarking pricing, and so on—before even having a conversation with a supplier.*

## Buyers Delay Vendor Engagement





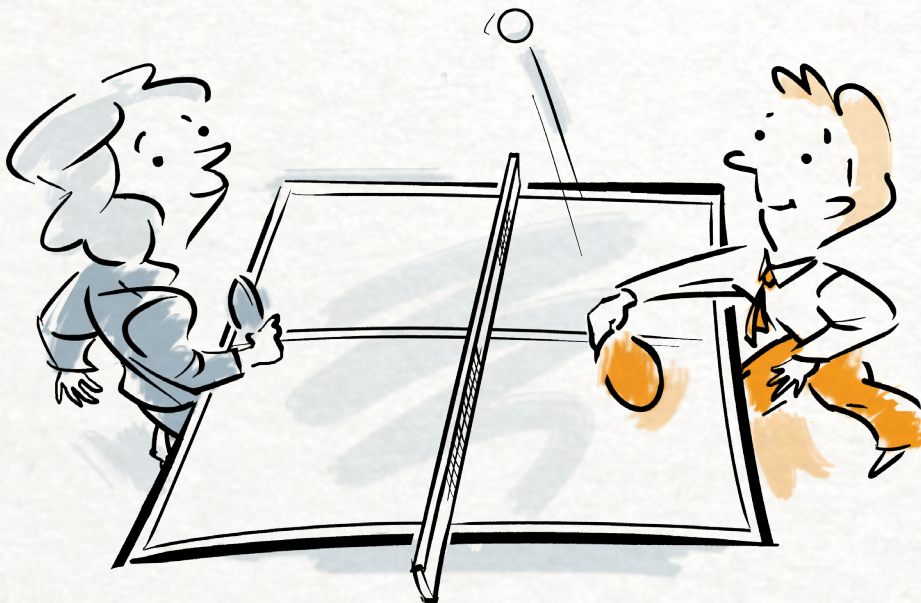
# WHERE'S THE LEAD GENERATION?

Given that sales and marketing execs often have misaligned objectives, who owns the task of generating leads? Does it fall to marketing? Well, 65% of marketers say generating traffic and leads is their biggest challenge.<sup>v</sup> That indicates that they take responsibility for the task. They're just not very good at it. And they're awfully busy with all those inbound marketing activities.

Should lead generation fall to sales? They fail to follow up on half the leads that marketing generates.<sup>vi</sup> Does that mean that they are choosing to take on the task? But they're focused on closing the next big deal, not generating new leads that may take weeks or months to become a sale.

My guess? Lead generation isn't really happening—at least not in a systematic, organized, efficient way.

## Lead Generation





# INBOUND MARKETING:

## WHY LEAD SCORING ALONE DOESN'T WORK

There's no doubt that the Internet has transformed buyer behavior, shifting the power in their direction. But the good news is that you have greater access to your prospects through social media channels. Rightfully so, inbound marketing is often the name of the game.

But problems arise when we try to measure it all:

- Multiple touch points don't necessarily equate to higher interest
- Scoring interest based on a buyer's interactions with your content uses a formulaic approach where a human connection is needed
- No mathematical formula can work when decisions are based on gut reactions

And really, who's to say that the person requesting your white papers and case studies isn't a student gathering research for a term paper?

Scoring a lead isn't the same as qualifying it.



"Meet Carl, CIO, ABC Company. His lead score is low because he doesn't have time to read Acme's content. He's interested in buying, but nobody has called him."



# HOW EXACTLY DO YOU QUALIFY A LEAD?

Qualifying a lead involves much more than gauging interest level. Interest is one thing. The readiness and ability to buy is something else altogether.

Earlier, we mentioned that sales reps tend to follow through on only half of leads from marketing. It's all about qualification, folks. If little is done to qualify a lead, then it's practically worthless. And guess what? Your sales teams know it.

So improve your leads. Qualify them. How? Use this simple checklist:

- Budget
- Authority (to buy)
- Need (for your solution)
- Timing (now or later?)
- Solution (Does the Solution meet the Need?)

Make sure you have information on each of these criteria before handing the lead off to sales. And if there are any criteria that you can't check off, hang on to the lead and send it into your nurturing process. Don't hand it off until the intent and readiness to buy is apparent.





# SALES REPS' ROLE IN THE LEAD GENERATION GAP

We've talked a lot about marketing's role in the lead generation gap. But what about sales? Are they at least partly to blame? Lead generation, particularly in B2B, can be a lengthy process. Buyers often need to be nurtured. Relationships need to be developed. Sales? They want the deal, and they want it quickly.

## COMMISSION CRAZED

When we think of sales, we see dollar signs. It is their job to make the next big sale and rightly so. How else would a company get its products out the door? But when it comes to lead generation, making an immediate sale cannot be the focus.

## GOING FOR THE KILL

Sales people are hunters, not gatherers. Their aggressive sales tactics don't work when a long-term nurturing approach is more appropriate.

## PITCH POSSESSED

Generating leads is all about developing relationships. Sales reps sometimes shoot themselves in the foot by leading with the pitch. Before delivering a pitch, someone in sales or marketing needs to have a conversation with the buyer on topics that are most relevant to his needs.



"New and improved!!! Buy now and you'll receive a FREE..."



# HUMAN TOUCH IN A DIGITAL WORLD

WITH ALL OF OUR CONNECTIVITY, WE'RE MORE DISCONNECTED THAN EVER

Smartphones. Tablets. Facebook. Twitter. Chatbots. LinkedIn. Technology is powerful, especially in sales and marketing. But in our always-on, smartphone-at-the-bedside world, we're actually less connected with the real world. We're all interacting with our screens, not each other.

How many conversations do you have in a day that don't involve actually speaking? And how many times have you felt entirely ignored when you're sitting with people whose noses are in their phones? It's not pretty.

Think about how technology affects your interactions with potential buyers. Sure, social media and email enable you to reach many potential buyers with a single click. It's hugely efficient.

But if lead generation is all about establishing relationships, you can't let technology do all of the heavy lifting. Besides, how emotionally attached can you get in 280 characters?

*Gartner Research claims that by 2020, customers will manage 85% of their relationship with a business without talking to a human being.*

~ Gartner Research





# THE ANSWER TO YOUR LEAD GENERATION WOES?

## THE HUMAN TOUCH

When we reach our most prized customers and prospects on a human, emotional level, the effects are powerful. The human touch lets us break through the online clutter to establish a connection, build trust, gain credibility, and maintain relationships over time.

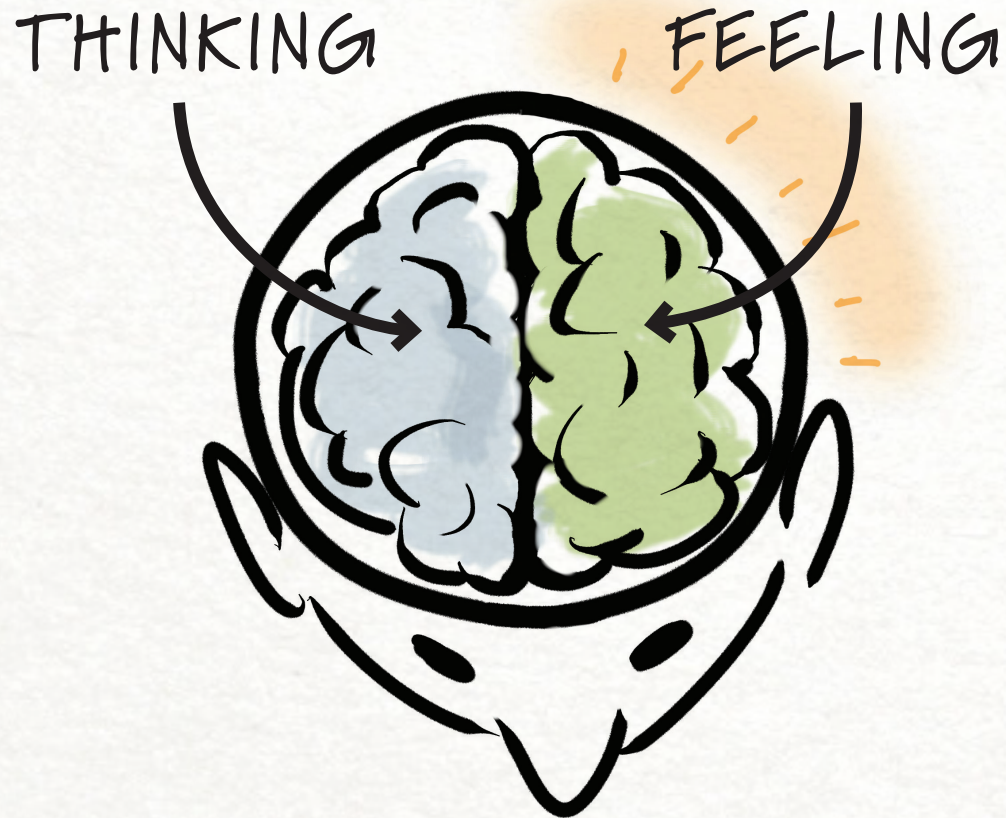
What more could you want? Sure, technology is efficient. But the human touch is effective. People are more likely to listen to a sales pitch if they feel a connection with you.

And what makes people buy? Companies invest millions in market research to find out what makes people tick. Yet fundamentally, buyers are people looking for answers. Often, gut reactions are involved. People buy from the people they like.

Besides, the human touch is much more memorable than any email or Twitter campaign will ever be.



# FEELING VS. THINKING



*“Humans are wired to connect with each other. And we connect with one another by feeling, not thinking.... Emotion is now increasingly recognized as the key to moving hearts and minds.”*

~ Helio Fred Garcia, *The Power of Communication*

*“The key to really getting people to listen—and act: Touch them on an emotional level.”*

~ 5 Ways to Get People to Listen to You, Inc.com



# HOW TO BE HUMAN

What? You already know how to be human? Okay, you don't need an instruction manual. But in the fervor for social media and marketing automation technologies, it can be easy to lose sight of what it means to establish a connection with another human being. So what does being human look like in lead generation?

## BE REAL

Lead with your sales pitch or try to pull the wool over people's eyes, and they'll see right through you. Honest conversations about the issues that matter most will make your prospects feel valued.

## BE MEMORABLE

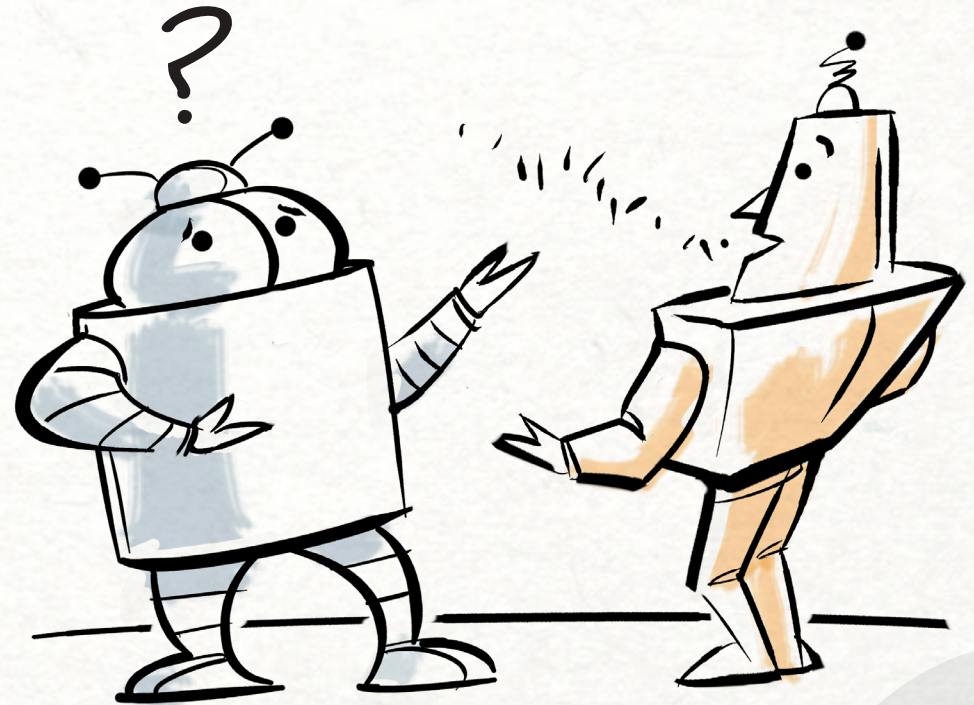
Go beyond LinkedIn. A live, two-way conversation is much more individualized and memorable than any social media platform can ever be.

## BE RELEVANT

Offer your prospects something they value. Discuss the topics they want to discuss. Find out what matters most and stick with it.

## BE AN INDIVIDUAL

Know your buyer. Figure out what they want. Learn the lingo of their industry. Then tell them how you can solve their specific challenges. Just don't boast or shill your stuff.





# LEAD GENERATION WITH A HUMAN TOUCH

## PICK UP THE PHONE

You're sold on this human touch idea. Right? So how do you actually go about generating leads with a human touch? How do you give your sales reps the qualified leads they need?

It's all about picking up the phone and having a chat. Call it tele-services. Call it telemarketing. Call it Inside Sales. Call it what you will. But most of all, call it effective.

There's so much that can be done over the phone:

- Lead generation
- Lead qualification
- Appointment setting
- Response management
- Event attendance recruitment and follow-up
- Account profiling

Let's explore...



"Why yes, Carl, Steve and I would love to meet up for coffee on Friday."



# LEAD GENERATION VIA TELE-SERVICES

The telephone. I know, it sounds old school. Twitter and Facebook are shiny and new. But wouldn't you rather have something that works and brings tangible results (today) than shiny and new?

## CONNECT (MINUS THE COMPUTER SCREEN)

Like no other method, picking up the phone—or having someone do it for you—will generate the leads your sales reps need. Connecting with a prospect in an engaging, one-on-one conversation brings the human touch that is sorely lacking in social media. It's all about real human beings interacting with other human beings—without a screen getting in the way.

## HAVE A METHOD BEHIND THE MADNESS

Marketers like to measure stuff. They like to prove their worth. You may be thinking that human connections can't be measured. Fret not! A tele-services agency will help you develop relationships and measure every activity they perform.

## TRUST IN SPECIALIZED B2B TELE-SERVICES

Tele-services agencies who specialize in B2B are nothing like the scripted, aggressive agents who interrupt your dinner. These agencies know your business, your industry, and can speak about your products and services with confidence.

### SIGNS OF AN EFFECTIVE AGENT

**Not all tele-services agents are created equal. An agency specializing in B2B only hires agents who:**

- **Have specific industry experience**
- **Are highly educated (with a college degree)**
- **Speak in their native languages**
- **Can carry an intelligent conversation without a script**



# QUALIFYING LEADS ON THE PHONE

Remember that statistic I mentioned about sales not following through on 50% of the leads marketing gives them? It's all about qualification. If you qualify leads and only pass along the good ones, your sales reps will use them.

Using the BANTS criteria, a tele-services agent can verify that the prospect:

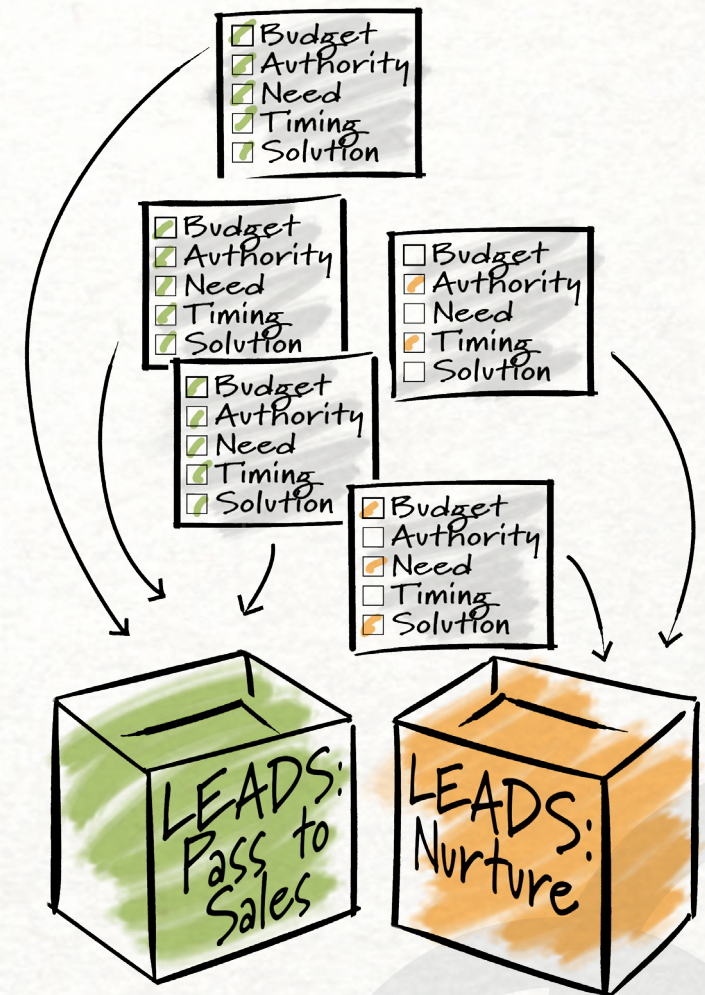
- Has the budget for your product or service
- Has the authority to make the purchasing decision, not just recommend the purchase
- Has a clear need for your product or service
- Is ready to buy in the immediate future, not months or years down the road
- Knows that the solution will do the job

Typically, marketing does very little to qualify leads in this way. They rely on sales to qualify them. But when sales reps take it on, they often dump any lead that doesn't represent an immediate opportunity. Any lead that requires nurturing is simply ignored.

## BUSINESS INTELLIGENCE VIA TELE-SERVICES

While qualifying leads, tele-services agents also learn:

- All about a buyer's challenges
- How the buyer's decision process works
- Any objections buyers have
- What knowledge gaps the buyer may have
- Any unexpected barriers to the sale
- And even who your competitors are





# CASE STUDY: ENTERPRISE CLOUD COMPANY

## MANAGES GROWTH WITH 3D2B

An Internet content delivery company approached 3D2B, a B2B tele-services agency, for help. They wanted to increase their pipeline of potential customers in targeted industries and bring awareness to the company and its solutions.

After two successful years, 3D2B achieved the company's objectives.

*"After generating 12 qualified leads in our 10-day pilot project, we knew we could offer tangible results. Our contract was eventually extended to two years."*

~ Amanda Ferraioli, Account Director, 3D2B

total	results	conversion rate
8,107 prospective accounts	4,624 closed	57%
267 qualified leads	168 sales opportunities	63%

3D2B also identified 166 long-term opportunities to be sent into the nurturing cycle.



# NURTURE PROSPECTS WHO AREN'T READY

Developing relationships with a human touch takes time. Sometimes, for whatever reason, people just aren't ready to buy. These are the leads that require careful consideration. It's easy for them to get lost in the shuffle.

It's usually a mistake to pass these leads on to sales. Your sales reps are focused on immediate opportunities. Any lead that isn't ready will be forgotten.

And unfortunately, many marketing organizations simply don't have a system for nurturing leads. When they do, it's usually missing the human touch.

Tele-services can help build relationships with your buyers until they are ready to buy or move onto the next phase of the sales cycle.

Leads who need to be nurtured are leads nonetheless. Don't lose them!





# GET THE NEXT BIG MEETING VIA TELE-SERVICES

Sales is all about getting the attention of the people who are most likely to buy your products and services. And face-to-face meetings are all the more important in B2B where products are complex, and sales cycles are long. You need your prospects' eyes and ears!

Tele-services agencies can schedule these meetings for you. And since all lead qualification will already have taken place, your sales reps will know exactly how to address the prospect.

- Is the buyer early in the process, still learning about you and your competitors?
- Has the buyer already seen a demo and experienced your products in person yet has no idea how much it will all cost?
- Is the buyer ready to sit down and draft a deal?

It's important to know the answers to these questions, so the sales rep is prepared and makes the best use of everyone's time.

## SCHEDULE MEETINGS AT EVENTS

Rather than waiting around for buyers to visit your booth, why not have your tele-services agency schedule meetings with them? Your sales reps will have their full attention for the allotted time. And by knowing their needs ahead of time, sales can maximize every minute of the meeting.





# RESPOND TO INBOUND INQUIRIES WITH A PHONE CALL

Even the most fervent supporters of inbound marketing would agree that it can't stand on its own. Inbound marketing tactics like promoting a white paper via LinkedIn or holding a webinar with hundreds of attendees can be powerful in their own right. Yet these activities are more effective when complemented with outbound activities.

Say you have a prospect who has downloaded a large amount of your content. He has attended your webinars. He comments on your blog posts. He even shares your content on LinkedIn and Twitter. What then? He's a pretty strong prospect. Do you do anything about it?

With a tele-services agency, you can reach out to these prospects with a phone call. Again, we're talking about human touch lead generation here. Your inbound marketing activities have done their job. Now get the computer screen out of the way and establish a human connection.





# USE THE PHONE TO BOOST EVENT EFFECTIVENESS

Events are hugely important. Whether you attend your industry's largest tradeshows or host events of your own, the power of face-to-face events is unmistakable.

The good news? Events gather many valuable prospects in one place. Nine in ten attendees say trade shows impact their buying decisions.<sup>vii</sup>

The bad news? Events are expensive.

The really bad news? 85% of marketers fail to follow up on leads generated at events.<sup>viii</sup>

With a tele-services agency by your side, you can:

- Generate awareness and promote attendance before the event
- Gather quality information and schedule appointments to take place at the event
- Follow up on and nurture leads after the event

Events are one of your best opportunities for generating leads. Make sure you have every phase of the event lifecycle covered—and don't forget to bring a human touch.



***64% of marketers say events are their most successful tactic for converting and accelerating leads during the mid and late stages of the sales funnel, more than any other tactic.<sup>ix</sup>***



# 3 OUT OF 4 REPORT EVENTS ARE CRITICAL FOR CUSTOMER ENGAGEMENT

Not only do a large majority of B2B professionals view events as very important for driving customer engagement, but also they believe that their importance is continuing to increase.<sup>x</sup>

*3 Out of 4 B2B Professionals Report Events  
are Critical for Customer Engagement*





## CASE STUDY: 3D2B OUTPERFORMS IN ADVANCE OF TRADESHOW

A 3D2B client in the enterprise software business was preparing to attend Sibos, an event that typically draws 7,000 top decision-makers and experts in the financial services industry. The client asked 3D2B to call event participants to prequalify them and to set up appointments with sales reps at the event.

The client gave 3D2B access to its main calendar so appointments could be gathered in one centralized location. With only two weeks, 3D2B surpassed its appointment-setting goal by 70%.

Ultimately, the client was pleased with the number of appointments scheduled, particularly among top-level decision-makers in the financial sector.

***“After scheduling 70% more appointments than expected, we helped the client make the most of an important industry event.”***

***~ Amanda Ferraioli, Account Director, 3D2B***



# IMPROVE YOUR LISTS AND PROFILE ACCOUNTS

A tele-services agency can do so much to generate leads, nurture them, respond to their inquiries, set up meetings and improve event effectiveness. But it all starts with a good list. Not even the best tele-services agency can generate leads with a bad list.

Boost the quality of your lists. Have your tele-services agency:

- Develop a database of divisions and decision-makers
- Make contacts in other departments within a single enterprise
- Use list data for cold calling and future outbound and inbound activities

Say you have a handful of contacts within a certain division of a large enterprise. Wouldn't your sale be that much bigger if you had contacts in five more divisions?

## ACCOUNT PROFILING RESULTS

**Working with a long-time client to profile accounts, 3D2B added a total of 21,000 contacts across five major lines of business. 78% of those contacts are directors or above. And 3D2B captured email addresses for 68% of the new contacts.**



# LEAD GENERATION NEEDS ASSESSMENT

## CAN TELE-SERVICES HELP?

Clearly, there's a lot that a tele-services agency can do for you. And if you have difficulty with lead generation—as most marketers do—then lead generation with a human touch can completely transform your marketing organization. It'll make you and your sales reps look good. Ultimately, you'll help boost your company's growth.

Before jumping in with two feet, this simple needs assessment can help you determine where tele-services can help. Ask yourself:

- Do I have a formal process for lead generation?
- Do my marketing efforts have a human touch?
- Do my sales reps seem to struggle with lead generation?
- Are our leads qualified in a formal, structured way?
- Do we have an organized lead nurturing process?
- Do we have a human touch process to respond to inbound inquiries?
- Can we help sales reps schedule meetings?
- Could our events be improved with tele-services?

After you nail down the answers to these questions, be smart about it. Don't try to tackle it all in-house. Trust the experts. And trust them to consult with you on the project to help you determine how to spend your hard-earned marketing dollars.

Feel free to contact me directly to get started: [jeff.kalter@3D2B.com](mailto:jeff.kalter@3D2B.com). Or download some white papers and subscribe to our blog at [www.3D2B.com](http://www.3D2B.com).



# IT'S NICE TO SHARE

ISN'T THAT WHAT YOUR MOM ALWAYS SAID?

This e-book is designed to be shared. Play nice with your colleagues and social media communities and share the wealth. If you found any of the information useful, I bet your colleagues will too.





# WHO ARE WE?

## ABOUT THE AUTHOR



Jeff Kalter is the co-founder and CEO of 3D2B, a B2B tele-services firm that helps sales and marketing organizations across the globe generate qualified leads, cultivate relationships with targeted buyers, and grow existing customer accounts.

Jeff co-founded 3D2B after recognizing a need for high-end global tele-services for B2B companies. What started as a small, two-person company has grown into a multinational business with more than 100 employees.

Born and raised in New York City, Jeff currently resides in Rome, Italy and New York City.

## ABOUT 3D2B

Founded in 2003, 3D2B provides high-end tele-services for B2B lead generation. With offices in Rome, Italy and Tampa, Florida, 3D2B assists sales and marketing organizations around the globe.

3D2B prides itself in the fact that its agents are highly educated, natively speak the languages they cover, and have industry-specific experience.



# WE'D LOVE TO CHAT

CONTACT US TO SEE HOW WE CAN HELP YOU

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## ENDNOTES

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