

# How can marketing qualify sales leads in times of no handshakes?



Face-to-face discovery calls, meetups at conferences or sales meetings are the bread and butter of salespeople. They rely on these encounters to engage and evaluate prospects and determine who is most suited to move the relationship to the next stage.

But nowadays, salespeople have to cope with a new reality. How can they do effective lead qualification remotely? How do they evaluate leads when there is no face-to-face engagement? How can companies, especially marketing teams, take a hands-on approach for 'no handshake' sales qualification?

## Sales qualification is about discovery

Sales qualification is all about determining whether your prospect has a specific need or challenge that your company can satisfy. In other words, it's about discovering whether there is a good prospect-product fit.

Whether it's at a conference, company event or lunch meeting, salespeople use physical engagement points as a 'learning process, in which to pick up vital clues, insights and body language that will enable them to evaluate the prospect and qualify the nature of the opportunity.

## Marketing's key role in lead qualification

The role of marketing in lead qualification has both changed and been upgraded. It is currently taking on extra duties to prepare sales reps to qualify leads effectively in the virtual-online space – a space that is less familiar to sales-people as it 'diminishes' their natural strengths.

At Xtra Mile we've identified three innovative steps marketing teams can take to support the sales qualification process in the virtual world.

## 3 NEW APPROACHES

1

Redesign marketing collaterals to fit the new situation

2

Enrich salespeople's 'personal' knowledge of each prospect

3

Pre-engage prospects through activities that create a richer personal connection



1

## Prepare different types of marketing collaterals like remote-friendly kits & sales decks

Marketing needs to play a more active role in sales support. This begins with revamping marketing collaterals so that they work within the constraints of a Zoom videoconference rather than a meeting around a table.

### Example from a SaaS provider

In the current situation, where business is anything but usual, potential clients are naturally anxious about how their provider will help them stay in control of their initiatives. A SaaS providers made changes to its sales qualification process in two distinct ways.

- First, they redesigned their entire workflow to make it WFH-friendly. For example, in the absence of regular face-to-face status meetings, they now offer clients PM and collaboration tools like Monday and dashboards so they can monitor initiative independently.
- Then they completely revamped their marketing materials, sales kits and one pagers so they could stand on 'their own feet', without the need for a face-to-face presentation or a biz dev person being in the room to feel the vibe.

2

## Help enrich salespeople's knowledge of their prospects

The more datapoints you have about a prospect on the other side of an email or phone, the better your salespeople can qualify the leads. Marketing must switch to research and enrichment mode. Like a private investigator, they can create enriched and personal 'prospect profiles' that provide salespeople with nuggets of personal and professional information that they can drop into emails, LinkedIn messages and Zoom calls.

### An example from Xtra Mile

Xtra Mile's hybrid ABM/LeadGen approach provides marketers with a step-by-step methodology for enriching prospect profiles based on where a prospect is in the sales cycle. Our Deep Enrichment methodology involves harvesting insights from Facebook, Twitter and LinkedIn, studying a prospects profile, comments, groups & networks, and even things they are posting and commenting on.

"I hate zoom!", "I have nowhere to work out!", "I miss my bike" were some throwaway comments we noticed during our research of some prospects. These provide proactive marketers with golden nuggets for engaging with prospects.



3

## Marketing can 'act' on insights

Marketers can hand over the information they collected directly to their sales colleagues so that they can leverage the insights and include them in their conversations. But marketers can go a step further using this information to create customized marketing content or thoughtful giveaways to give salespeople a foot in the door.

### An example from a medical devices manufacturer

Remember those throw-away comments we discovered in our social media research and profile enrichment? "I hate Zoom!", "I have nowhere to work out!", "I miss my bike"? Well, this company used them to tailor personalized gifts that spoke to each of their prospects' frustrations about trying to maintain a steady regime while working from home. For example, the potential client who complained about their annoyance with Zoom calls received a pair of headphones. This opened up a clear channel for their salespeople to follow up on.



## CLOSING THOUGHTS: New opportunities for sales qualification

Salespeople thrive on face-to-face interactions with prospects and rely on these engagements to evaluate and qualify their leads. In this article, we've shown several ways how marketers can compensate for the lack of physical interactions to support their sales teams.

However, more than being just a temporary workaround until we all go back to our old routines, we believe the current crisis is teaching us some important lessons. When you can't meet in person, you need to imitate the meeting in the virtual space. Using enrichment techniques to create more meaningful and personalized interactions, you can engage more fully with prospects than ever before.