



The Case of the Ghostly Leads and how Forensic Marketing Saved the Day!

eBook



What is “forensic marketing”?

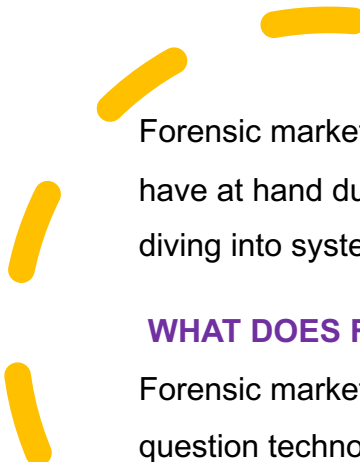
Forensic marketing is a term coined by one a colleague about the style with which we do business at AskNya powered by Automate 2 Inspire. It was an awe-inspiring conversation about digging into the weeds of a marketing automation system to identify what’s working and what’s not. It’s not your ordinary system audit--it is so much more!

There was an article some time ago on VentureBeat, about the lack of skilled workers in marketing automation.

“Mid-sized B2B companies and corporations that use marketing automation platforms (MAPs) lack experienced users and underestimate the amount of resource needed to drive effective MAP adoption.”

STEWART RODGERS, VB INSIGHTS





Forensic marketing is quickly becoming a necessary talent to have at hand due to inexperienced and unskilled team members diving into systems and trying to learn on the fly.


WHAT DOES FORENSIC MARKETING DO?

Forensic marketing dives deep into the caverns and dares to question technology, question processes, and identify gaps and issues unknown to the common modern marketer.

Questions are often asked that takes marketers into unknown territory. Forensic marketing is about pushing the boundaries of acceptable marketing and seeing a different future—a future where world-class demand generation and cross channel two-way communication is not only achieved, but a daily occurrence.

Forensic marketing looks at the details. Question everything. Never settling for the coined term, “That’s the way we’ve always done it.” Forensic marketing experts have diverse background from diverse industries.





These ARE the Pioneers of today's Marketing World

These marketers are the ones who pioneer new frontiers and are not afraid to challenge the status quo. You may know some in your midst. Not all of us are cut out to be Forensic Marketers as this field is not for the light-hearted. It takes a sleuthing ability similar that of the investigators of yesteryear and the courage to ask why.





Top 10 Characteristics of the Forensic Marketer



Characteristics of the Forensic Marketer



1 DIVERSITY

They have worked in many diverse marketing departments and touched many marketing automation technologies so intimately that they get what makes the systems tick.

2 CONNECTORS

Forensic marketers have the unique ability to connect the dots. For example, take four disparate systems and link them together into a cohesive strategy that makes the company run like a well-oiled machine.

3 COURAGE

These marketers have courage. Tremendous courage. They not only are committed to creating world-class organizations, they are not afraid to dive in or hire someone to dive in and see where the roadblocks are.

5 TENACIOUS

Forensic Marketers are like a tiger hunting its prey. They follow leads and sniff out opportunities at every corner. Continuous improvement is their bedrock and they are not afraid to venture into the jungle of tangled webs to discover how to move quicker, faster and more efficient.

4 AUDACIOUS

Not much to say here. These marketers are the pioneers of the new millenium. They are truly innovative and fearless.



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Characteristics of the Forensic Marketer Continued



6 ENCHANTMENT

Forensic marketers have a unique ability to be highly skilled technologists while maintaining an enchanting ability to deliver news to executive teams in a manner that causes change.

7 CUSTOMER EXPERIENCE

Forensic marketers always have the customer in mind. Forensic marketers look into the systems with a spyglass questioning every turn on behalf of the customer experience.



8 FEARLESS

Forensic Marketers unravel webs of issues and are secure in their abilities to try new things. They discover solutions in the midst of chaos.

9 PRECIOUS

Forensic Marketers are rare. Like the most prized diamond, once you find one, keep it. For these marketers are few and far between.

10 INTERWOVEN SKILLS

Forensic Marketers are part sleuth, part technologist, part strategist, part creative genius, and part brilliance all rolled into one being.



Case Study: The Case of the Ghostly Leads

Case Overview

This case takes place in the Emerald City of Seattle, Washington. It was a sunny day in Seattle, which is rare in and of itself. The Forensic Marketer walked down the streets of Pioneer Square with thoughts racing through her mind. She knew she had a challenging feat in front of her. The company was using a MAP (marketing automation platform) and Salesforce. They had the two systems synched. This was an up-and-coming start-up with loads of promise.

PROBLEM OVERVIEW:

Lead volume had dropped over the previous year by more than 40% and nobody seemed to know why. The Chief Revenue Officer knew something was wrong, but simply couldn't put his finger on it.

The VP of Marketing was tasked with leading the demand generation team which was measured by how many leads came in and how many converted. To date, the VP was more than a little concerned about his reputation with the CRO. The question remained, why are there 40% less leads coming to the sales team when nothing was known to have changed in the marketing automation platform?





THE FORENSIC MARKETER SLEUTHING:

The Forensic Marketer began in Salesforce rather than the marketing automation system. She reviewed the lead distribution rules. There were 67 lead distribution rules that were generated by a contract employee. He was a young energetic self-taught technologist who loved everything Salesforce.

Unfortunately, he had a terrible knack for messing up logic. Hence, the 67 rules had conflicting logic. What was found as a result was the leads were getting stuck due to this conflicting logic and routing to a junk queue but they were actually really great leads.


The Forensic Marketer took a week and fixed all the distribution rules and then tested them. They were working. But why did the company experience a 40% drop in lead volume. This may explain some of it, but she knew it wasn't the only issue. Enter a marketing automation platform Forensic audit.

MYSTERY SOLVED.

Upon following the popcorn trail of leads, the Forensic Marketer uncovered 25,000 leads stuck in a marketing queue in Salesforce. Because the lead distribution rules did not include the logic to route those leads properly, any of the remaining leads simply hit a queue rather than a salespersons' inbox. Now, these were highly scored leads where people were asking for information about the company and wanted to be called. This was a huge find. Fixing it was a completely different journey.

You see, there were a set of lead allocation rules created also in the marketing automation system as to distribute the leads as well. The problem was, the logic in the marketing automation system was even worse than the logic in Salesforce thereby sending all leads that didn't meet the criteria to a queue that nobody ever looked at.





What would you do with 25,000 missing leads?

The 25,000 leads were sent a multi-channel nurture complete with inside sales team outreach. The outcome, over 22% of those found closed into real deals. What could have happened if those leads were actually routed to the right place at the right time?

Tips to Avoid this:

- Check your routing logic
- Have lead routing in one system only!!!
- Create an automated report in Salesforce or your MAP (marketing automation platform) to check for leads stuck
- Monitor this weekly as leads can get squirrely really quick



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