

B2B MARKETING AND SALES BLOG

CRM Expert David Taber Discusses How Marketing Automation Enhances CRM and Putting Your Leads on a Diet

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David Taber is a CRM expert and the author of the book, "Salesforce.com Secrets of Success," which covers the people, policy, and process issues surrounding effective CRM solutions. He is the CEO of [SalesLogistix](#), a specialist Salesforce.com implementer focused on improving business processes for Sales and Marketing alignment and effectiveness. I recently caught up with David to get his thoughts on the evolution of the Marketing Cloud and the importance of quality first in regards to generating [sales leads](#).

Marketo: Many CRM systems have a module for marketing, but how is [marketing automation](#) different and how can it make CRM solutions even better?

David: Marketing automation is a lot newer than SFA systems, and the good ones are a lot more sophisticated than traditional SFA. Think of it this way: sales reps don't want their jobs to be automated — they think of themselves as wizards of the art of persuasion. So the SFA is more about recording than automating.

In contrast, there are a lot of areas where marketers need the help of automation and want the analytic power of hard data. The SFA system gives sales management visibility and ability to control through information. Cool. Marketing automation is about making marketers, sales, and support people more effective. A way more ambitious goal, with a payoff that justifies the effort.

What makes marketing automation truly powerful is when it is fully integrated with the CRM, with data that is linked from first website touch through the close of the sale and beyond—clear payoffs in revenues and cost efficiency. Done right, Marketing automation can provide a lot of leverage on the qualitative side: branding, messaging, and customer satisfaction.

For more information, check out Marketo's recent blog [Mega-List of Features in Marketing Automation \(That You Won't Find in CRM\)](#).

Marketo: How can SFA/CRM systems support Product Management and Product Marketing?

David: Way back in the last century, I did the Product Management/Marketing thing for 10 years. The only available research tools you had were surveys and focus groups, eventually getting into email. The data was biased, easily garbled, and not really very relevant. Oh, how things have changed. Today, a properly configured CRM system can give the product manager an incredible amount of unbiased data about their customer base. No delays, no surveys, no phone calls to sales reps with an ax to grind.

For the product marketer, Campaigns and Programs give tremendous insight into what messages are working, what tactics are paying off, and what the decision-making process looks like. This gives unprecedented visibility and authoritative impact — but only if the Marketer is well versed in reporting and longitudinal analysis like Revenue Cycle Analytics. Too often, Marketers are light on this skill set.

Marketo: What are some best practices for Sales Development Reps?

David: Let's start with the sales people who work most closely with Marketo — they may be called lead cultivation, account development reps, sales development reps, sales support reps, or even "telesales." Even today, too many companies are not getting enough leverage out of this critical function. The key success factor is to make sure that the ADRs/SDRs are leveraging Marketo for the things it does best — automation, nurturing, scoring, and routing — and that they are working on leads *immediately* when they become MQLs.

In the US, the customer is just too impatient, so the best practice is to respond in single-digit hours. The flip side of this is to keep the outside/field sales reps away from Leads: their time is too valuable, they should be working only on Contacts, Account management, and Opportunities. I can't tell you how many sales organizations get this wrong.

Marketo: What about Support Reps? Any best practices there?

David: As I wrote recently in CIO, [Support is the new Pre-Sales](#). The support team isn't a cost center — in fact, they can have more to do with customer satisfaction than any other part of your company. Satisfaction means loyalty, which can mean upsells and renewals. The best practice here is to provide subtle technology and soft incentives for the customer to "re-up." You'll need to be clever in your campaign design and execution: done wrong, you scare customers away. Done right, there's gold in them hills.

Marketo: You recently wrote a very interesting blog post about putting your leads on a diet, can you tell me more about that?

David: The real issue is that there isn't a sales force in the world that doesn't ask for more leads. But the truth is they can't handle 5 times as many leads, what they really need is lead quality. So how do you weed out the leads that don't matter? I'd suggest putting leads you're unsure of in automation and then move those high value leads, those that are really progressing towards a deal, to a sales rep. It's that "sick of the noise ratio" that's plagued the marketing and sales relationship for a long time. We have to educate sales to focus on quality first, not quantity and with the right tools [marketing can deliver those quality leads](#).



Marketo: What's your focus for the rest of 2012 and what can we expect in 2013?

David: What's going on in our world at SalesLogistix, is that the size of customer engagements is growing dramatically. It's no longer 15, 20, 30 seats, it's 150, 200, 300 as a common deal. My biggest problem is growing my staff and the talent base required to handle those bigger customers. I think everyone's going to see that. The customer size is unbelievable and the kind of amateur hour that was the early Salesforce customer base isn't going to be that important for most vendors. They're all scaling up and they all need to be much better at the enterprise sales cycle.



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