How to automate lead generation

Your guide to building a scalable, high-performing top of funnel

pipedrive

Selling better shouldn't mean working more; it should mean working smarter.

If you and your sales reps spend most of your time scrambling for prospects and tracking your tasks instead of actually selling, it's time to reevaluate your process.

With simple yet powerful tweaks to your lead generation process, you can automate prospecting activities and enable your team to achieve new levels of productivity.

Contents

Section I

The art of automating lead generation

Where are your leads coming from?

Large, small, efficient or amateur: No matter the sales process, sales is still a numbers game. The number of deals you close still depends on how many leads you start with, no matter how high your close rate is.

Generating leads manually gives sales reps more control but takes up valuable time that could otherwise be invested into nurturing qualified leads. Manual lead generation hinders scaling.

Considering that most buyers are self-sufficient, all this hard manual work might not be the best strategy.

68% of today's business buyers prefer to do their own online research.[1]

1. Forrester Business Technographics Global Priorities & Journey Survey 2017

Constant stress or extreme focus?

Picture these two scenarios:

The atmosphere in your team is one of **perpetual chaos**.

You and your reps start early and finish late.

Everyone is scrambling for the best leads and jumping between tasks in the hope they can scrape together enough prospects to hit quota each month.

The team is **focused and calm**. Each rep is working on a consistent, structured sales process.

Reps know how many leads they need to close to hit quota.

Reps have the peace of mind that they'll come to the office with new leads to work on and know exactly how to invest their time.

Sales reps in the second scenario feel confident about their schedule because they know how to manage their time better.

Which scenario best applies to your sales team?

Organizing your lead generation process is relatively straightforward

Take back control and ease pressure on your reps with the right tools and processes:

- **Automate the time-consuming aspects of looking for prospects**
- **Enable reps to stop prospecting and learn more about their leads**
- **Remove administrative inefficiencies to stop jumping between tasks**
- **Build confidence and remove stress by allowing your reps to focus**

Turning interest into intent

One of the most powerful insights you can extract from lead generation is intent.

In other words: What are your ideal prospects looking for online? Which questions are they asking? How do you fit into that picture?

If their searches bring them to your website or a specific campaign, **don't you want to know who these prospects are?**

Some click on your CTAs and fill out forms to get a quote or download a resource. They volunteer their information in exchange for value.

You can use automation technology to score these prospects' intent and direct the more valuable ones into your sales pipeline.

Not all website visitors are quality leads

Some visitors land on a page, realize it's not what they were looking for and leave to look for a different solution:

- **Cold lead (not worth chasing)**

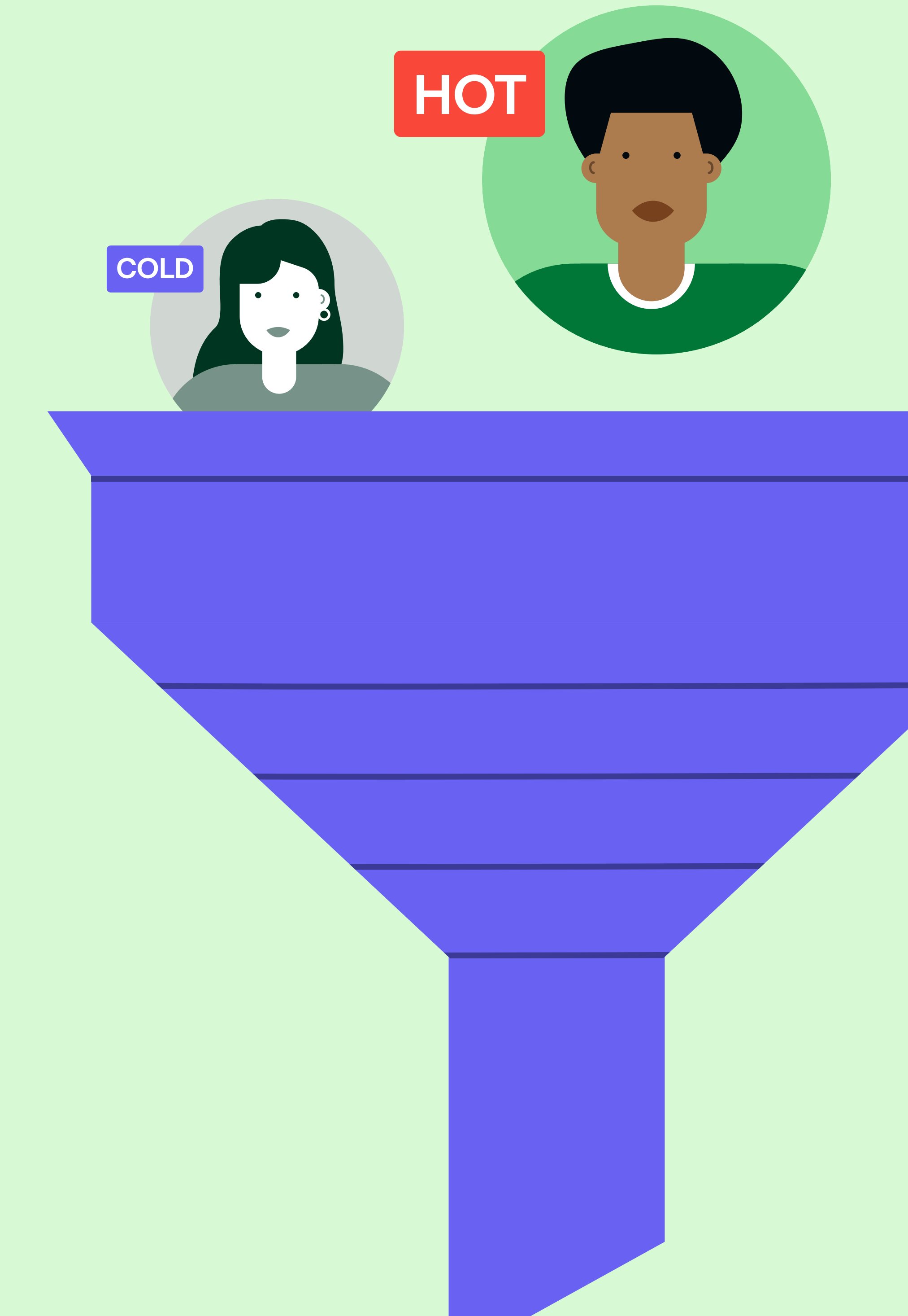
Others, however, may scroll through your homepage, look at product or feature pages and check out your pricing before returning to the homepage.

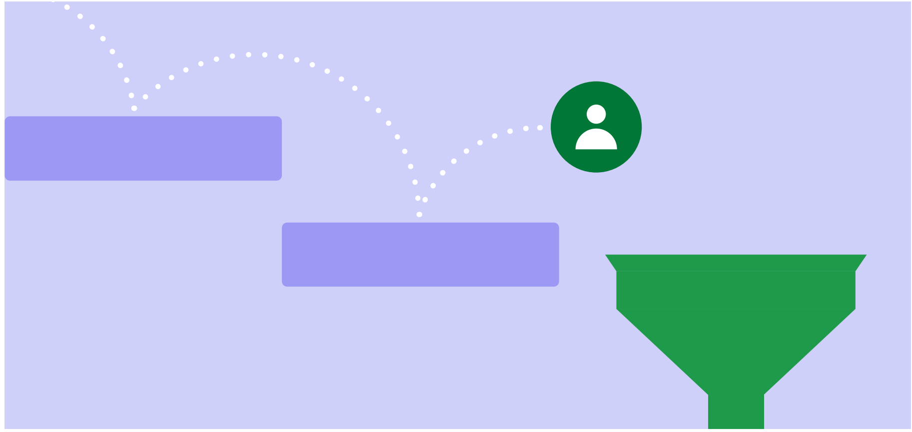
- **Warm lead (might be considering buying)**

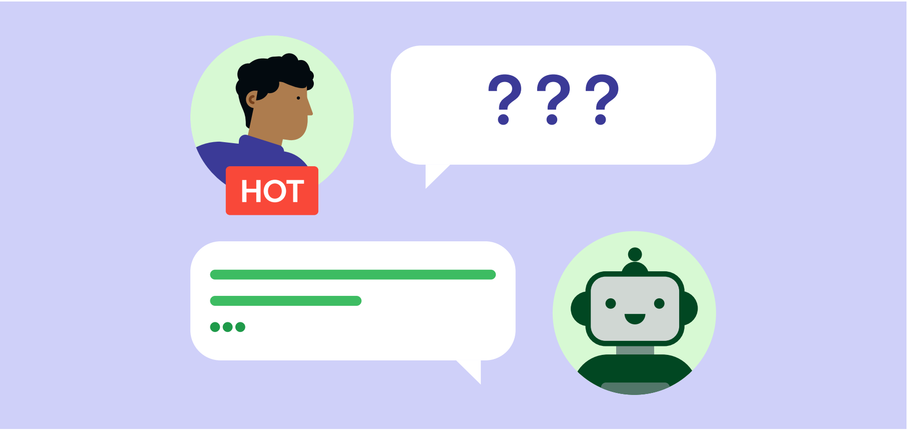
A lead like this could leave without a trace.

For most businesses, once a lead leaves the website, they're gone forever. Perhaps they got distracted, answered a phone call, left their desk or started browsing cat videos. Few will come back. Worse still, some will go with one of your competitors.

However, you can ensure these leads don't leave without a trace!







Capture web visitors before they bounce

If your strategy for acquiring web leads is based purely on prospects giving you their information and waiting for one of your sales reps to make contact, you're missing the opportunity to capture and qualify web visitors and convert them into sales-ready leads.

Salespeople are far more likely to lose a lead if their responses aren't virtually instantaneous. Sadly, providing instant responses isn't so easy. Most businesses don't have the luxury of operating a sales call center or around-the-clock live support team.

But what if you could use lead-gen automation technology to qualify web visitors and feed fresh, quality leads straight into your sales pipeline?

Get hot leads delivered 24/7

Most businesses can't rely on their sales team alone to generate qualified leads at scale. But now they don't have to! Leads are already coming to your website, researching your product and leaving without a trace.

It's time to capture, qualify and feed those leads to the right place using automation technology.

Conversational chatbots like [Pipedrive's LeadBooster] enable businesses to automatically qualify and talk to more leads, book more meetings and close deals faster. Install the bot on your website and configure it according to your lead qualification needs, then watch the leads roll in 24/7!

Never again lose a hot lead

Here's the thing: You're already sitting on a goldmine of data.

With a conversational bot like LeadBooster, you can capture, qualify and feed the right leads into the right stage of your lead qualification process. But there's even more data you can mine from your website visitors for insights for your sales team.

With a sales intelligence tool like Leadfeeder from Dealfront, you can record your visitor's company and which pages they've visited, then act on the right type of leads before a competitor can pounce.

The Leadfeeder app automates lead generation. It collects historical, 30-day data to capture crucial information about your website visitors. Leadfeeder will allow you to add context to the web visitors you capture with LeadBooster:

- **See which companies and people visit your website**
- **Find out which pages they're visiting (so you can work out what they're looking for)**
- **Engage a visitor from a target company immediately (by setting up email alerts)**

Automatically generate leads in Pipedrive and keep them updated with each new website visit from your lead

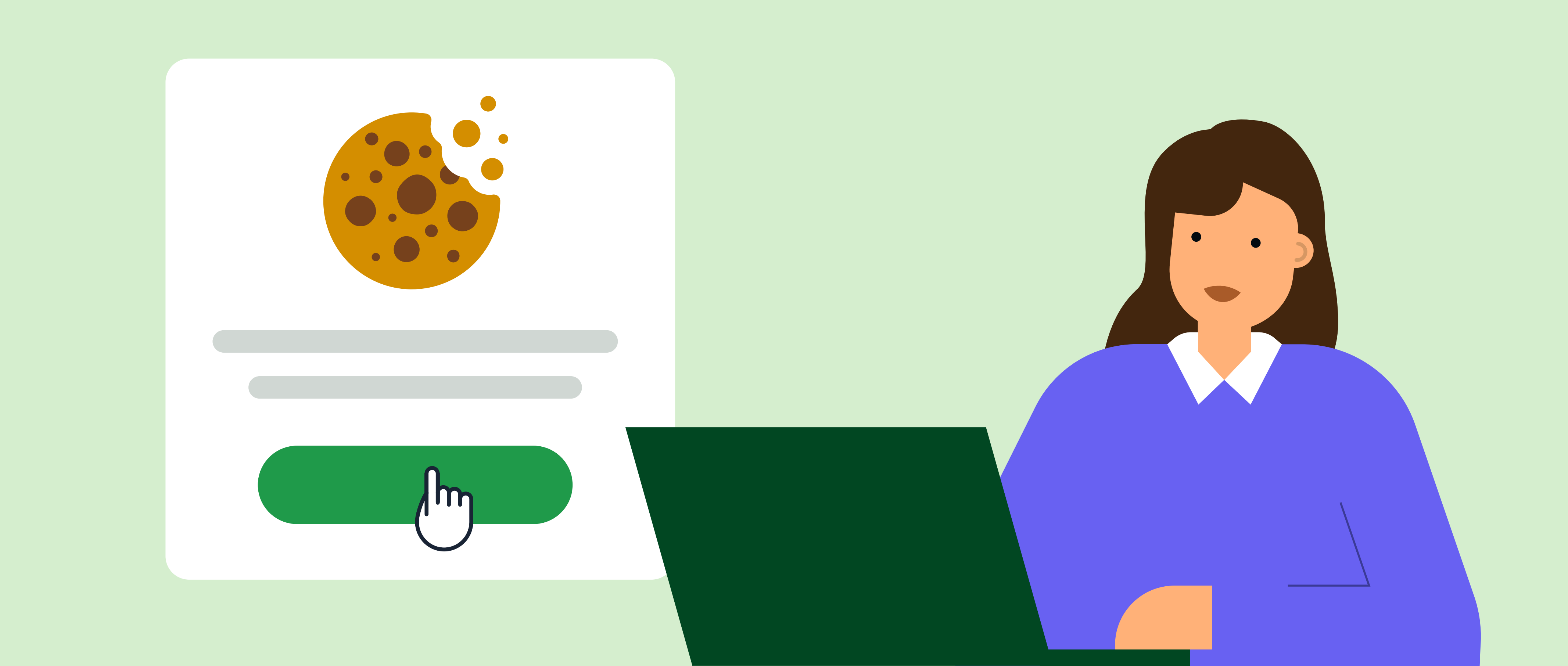
The result? No more lost prospects or hot leads going cold.

Combine the insights you generate using Leadfeeder with the 24/7-lead-capturing service of Pipedrive's LeadBooster to find the best website leads immediately and reach out at the ideal time.

51%

of global consumers are happy to exchange their data with businesses, as long as there is a clear benefit for doing so.[2]

2. Global data privacy: What the consumer really thinks



Section II

Easily getting the right sales information

Lead pre-qualification: a crucial time-saver

Your prospecting problems are sorted.

Leads are arriving in everyone's inboxes.

Your reps have a list of people who have shown interest in your product.

But there are two important things you need to do before establishing contact with a lead. This is where the true time-saving power of automated lead generation lies.

Although they're simple, these two actions make a huge difference:

- Capture all key information about your lead
- Know your best customers so you can make comparisons

Chasing the wrong prospects will waste your team's valuable time.

Even if a deal results in a sale, it might be too difficult or time-consuming to manage, damage your reputation or churn before you can profit from it.

Pre-qualifying leads is the secret weapon of every high-performing sales rep.

Before spending any time contacting a lead, diving into their pain point or creating a follow-up plan, you should generate a clear picture of who they are and what could influence their decisions.

How?

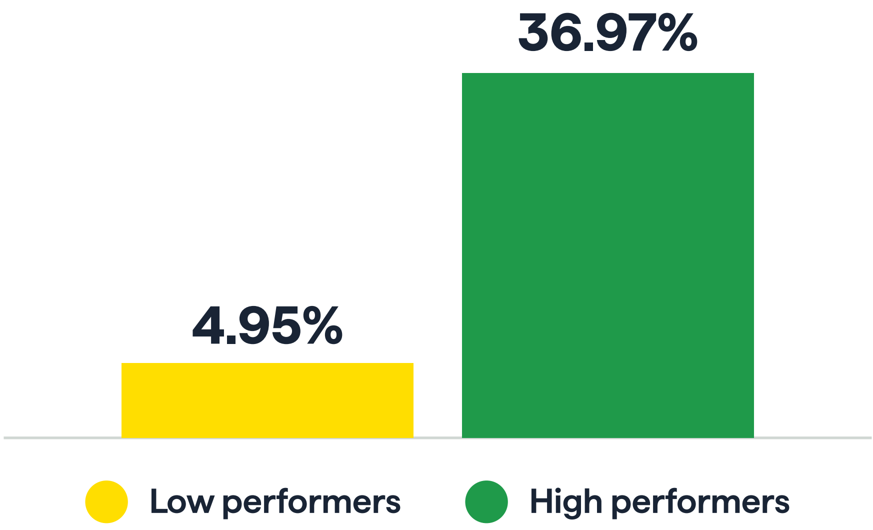
By comparing all information about this lead with data from their previous sales.

Look at prospects your team closed deals with in the past. Focus on your best customers.

Find the similarities between customers that became the most loyal, profitable and successful.

Finally, use these characteristics as pre-qualification mechanisms.This pre-qualification allows your sales team to calculate where to invest time instead of randomly attacking a list of indistinguishable leads.

Conversion rate



High performers have a **36.97% conversion rate and take, on average, 36.5 days to close a deal.**

With low performers, the average conversion rate is **4.95%, and they take 53.62 days to close.**[3]

Pre-qualify leads in one click

There's a specific challenge when it comes to pre-qualifying leads: you could waste hours before you realize you're working on the wrong ones.

This is where Pipedrive's Smart Contact Data feature comes to the rescue.

Instead of letting time-consuming research get in the way of making the sales that make your company run smoothly, you can pre-qualify your leads with a single click.

How?

Smart Contact Data collects all the public information your leads share online. All you need is an email address, which Pipedrive then uses to retrieve profile data and build a clearer picture of your potential customer.

Just like that, in seconds instead of hours, you'll have the information about your automatically generated lead right at your fingertips.

3. Pipedrive's Global Sales Performance Review

Finding the right demographics

It's time to see how this information compares with the right demographic profile.

What do your best customers have in common?

This data will empower you to precisely define your ideal prospect. Here are some data points you can use to get started:

- **Job title**
- **Industry or vertical**
- **Number of employees**
- **Annual revenue**
- **Geography**

Smart Contact Data will import publicly available information about your prospects from sources such as LinkedIn into Pipedrive. With this as your foundation, you can easily build up their profiles and compare them with your successful customers.

And if you want to capture more specific information, it's easy with Pipedrive's custom fields feature.

How to read your prospects' minds

Your sales reps need more than just job title or company size info to qualify and prioritize leads.

Before engaging directly with a lead, you want to know two critical things:

- **Where the lead is in their journey**
- **The depth of the problem your product can solve**

These two factors are hard to guess. You can't just research this manually. Your reps can't read minds; you'll need some technology to help.

Leadfeeder filters can automate some of this process for you.

Let's say your leads have mentioned specific pages from your website they've visited before talking to you.

You can use this, in practice, by getting Leadfeeder to create a deal in your Pipedrive pipeline when they pass a filter that includes visit frequency, length and pages visited.

The more specific the key pages in your filters, the better. This is as close to automated mind-reading as you can get!

Section III

The mastery of prioritizing sales opportunities

Curb the pressure with one clear process

A job in sales is mentally challenging. From reps to managers, there's a level of stress that never really goes away. The euphoria of closing a huge deal or scoring a juicy commission is offset by the unrelenting pressure to hit quotas – month after month.

The constant uncertainty, frequent rejection and fluctuating fortune can eat away at you and your team.

But you can manage and minimize this stress using an activity-based selling approach.

With the right sales process, your team will know which tasks they need to complete in a given sales cycle to provide them with the best possible chance of hitting quota.

You can control your output. You can't control results. If you can consistently organize your lead generation and qualification efforts, you can prioritize activities for your sales team and continually improve your close rate.

What makes a qualified lead?

Lead qualification helps you and your team prioritize potential customers and decide what to work on at any given moment.

A qualified lead:

Is both winnable and a lead you want to win

This lead fits your stated go-to-market strategy and is the type of customer and product you want to sell.

Fits your ideal customer profile

This lead possesses attributes, milestones or similarities that already exist among your desired customer base.

Has the authority, need and budget to purchase

The issues they experience, the budget they have to solve them and buying authority are key here.

Why you can’t skip lead qualification

What do you gain by establishing a bulletproof lead qualification process?

Effective use of time

When you know exactly where leads are in your sales funnel, you can prioritize quickly and chase the right leads right away.

Better follow-up

Fewer employees working on poorly qualified leads while other, better opportunities get lost to competitors.

Path to a higher return on investment

Less time wasted plus better quality leads equals higher return on time invested.

Perfect your lead qualification with our dedicated ebook

Learn how to find more of the right leads faster. This 22-page ebook will help you build a scalable lead qualification process for your team.

[Get your guide on this page]

Section IV

The power of a productive sales team

How to manage your sales pipeline

You can control activities, not outcomes. Your strategy works best when designed around processes rather than results. **Enter activity-based selling.**

> Never make assumptions about what someone is going to decide, do or spend.
>
> **Andrea Waltz**, co-author of “Go for No!”, a guide to overcoming rejection

The best way to put this into practice is by focusing on the following KPIs at all times:

- The number of deals in your pipeline
- The average size of the deals in your pipeline
- Your close ratio: the average percentage of deals closed
- The sales velocity: the average time it takes to close a deal

Focus only on a few essential sales metrics. This will help you regain clarity and manage your time efficiently.

What makes a qualified lead?

One of the simplest ways to ensure productivity for your sales teams is strategic lead routing.

In other words, **make sure each lead goes to the rep most likely to close that deal.**

For example, you can:

- **Use Leadfeeder filters to automatically sort leads by geography or number of visits**
- **Get visit data sent automatically to the right Pipedrive and email inboxes**
- **Assess the quality of the leads via the in-built scoring system, then assign each to the best rep**

The better you know what your sales reps excel at, the more efficiently you'll assign them the best leads.

Think about their soft skills, too. Some people win deals over the phone, others are masters of the written word.

Do more with less

You don't need to work on every lead under the sun to close more deals – you just need to work on the right ones.

The true power of automating your sales process comes from knowing what you and your team should be doing at any given moment.

What system do you have in place to help you focus on what matters?

Do you feel you spend more time adding data to your CRM than doing anything with it?

- **Automate your lead generation and integrations**
- **Capture all the information your reps need for lead qualification**
- **Set up an easy-to-use visual pipeline to focus and prioritize your team's workload**

How do you set up your lead generation engine?

Don't have a Pipedrive account yet?

Get full access to all Pipedrive's lead generation, qualification and management capabilities with your 14-day free trial and find out how over 100,000 sales teams use Pipedrive to slash admin time and focus on what they do best.

Hook up your Leadfeeder integration.

Connect your Pipedrive CRM with Leadfeeder to optimize your lead generation process. You can set up a free 14-day trial of Leadfeeder's software to see exactly how the Pipedrive and Leadfeeder integration can scale your sales.

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Want to learn more about how Pipedrive works?

Try Pipedrive for free for 14 days and see how we can help your business grow