



A Healthy Source of Qualified Leads

Background

A leading U.S. healthcare benefit provider was experiencing a problem with its web-based leads for additional information requests. When online request forms were submitted, the company distributed the inquiries directly to its broker community for follow-up. However, the inquiries were not pre-qualified, which caused brokers to lose confidence in the quality of the inquiries and stop following up on them. This led to frustration for the prospects because they were unable to obtain the requested information.

Challenge

The healthcare benefit provider sought a cost-effective way to qualify inquiries from its online request forms and to increase engagement between its brokers and the prospects that expressed interest in its services. The provider was also cognizant of the need to integrate this process into its demand generation efforts, which included direct mail and an outbound tele-channel.

Solution

Harland Clarke worked closely with the client to create and deploy a comprehensive lead management plan that included the following:

- An auto-responder program to respond to inquiries in a timely manner
- A comprehensive lead qualification process to ensure the quality of leads prior to distribution to brokers
- A seamless cultivation stream to enable potential leads to be nurtured
- An integrated, multi-touch, multichannel communication strategy designed to accommodate individual lead preferences
- In-depth reporting for analysis

What this means to you ...

An effective lead management plan closes the gap with Sales. This solution involves the sales team in the marketing process to reduce the number of lost sales opportunities.

A timely response to online inquiries yields greater results. With Harland Clarke Marketing Services' automated process, the lead management process is connected within one hour of receiving the lead.

A contact preference program is essential to ensuring lead accessibility. By allowing prospects to indicate when they are ready and willing to talk or email, a more productive communication will be enabled.

Cultivate leads that are not yet sales-ready so that you may convert them later. By developing a cultivation stream, Harland Clarke Marketing Services enables the pursuit of non-sales-ready leads for the future.

Provide qualified, sales-ready leads. Sales representatives will treat quality leads as a priority. This strategy works for firms selling through outside channels, as well as organizations with an internal salesforce.

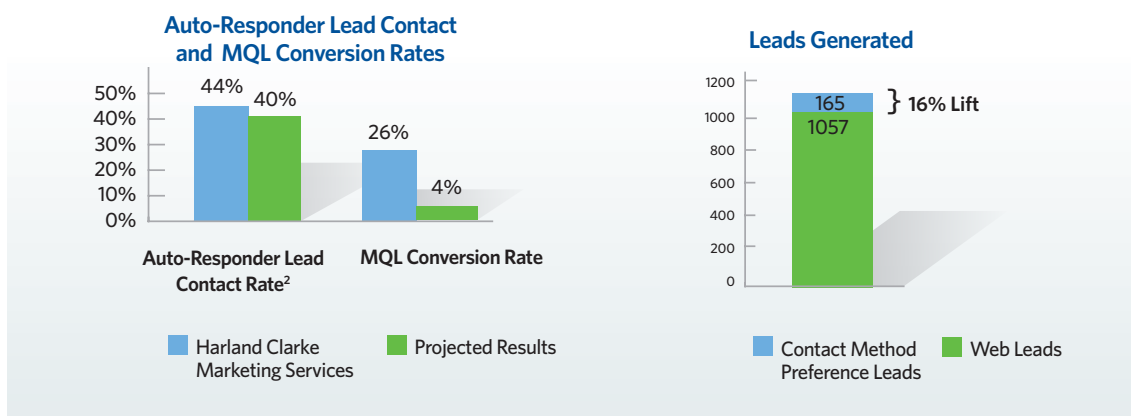
Harland Clarke Marketing Services developed an automated procedure for processing inbound online inquiries. The process to capture, qualify and deploy leads followed these steps:



If the prospect is not readily available, a process is in place to capture this information and integrate it into the Harland Clarke Marketing Services Lead Management Database. A call center specialist will follow up with the prospect at a more convenient time, using the method that he or she prefers — phone or email. If a lead is not deemed sales-ready, the contact is placed in a cultivation stream for future follow-up. Any non-responsive records are held for later analysis to improve targeting and segmenting.

Results

The program generated positive results for the client in two areas: lead generation and lead conversion. By responding to web inquiries in a timely manner, the client generated a 44% lead contact rate, with 26% of those contacts converting to a marketing qualified lead (MQL). This result was more than six times the projected rate.¹ The contact method preference program yielded an additional 165 MQLs, a 16% increase in converted sales leads.



¹Projected MQL conversion rate provided by SiriusDecisions®.

²Contact rate provided by Harland Clarke historical program results.