Lead Management Program Transformation of the Year (>1,000 employees)

An operations-led initiative that drove transformational change in the people, process, and technology of the lead management engine to improve speed, accuracy, and agility of lead distribution and response.

THE WINNER

The Challenge

BMC Software, a global IT company, was dealing with complex business logic around lead management. With various product pillars and a global team spread across multiple regions and countries with different local working hours and holidays, it was particularly difficult to track SLA compliance.

The lead management process was being run by one person, and while it was decided to shift the responsibilities cross-functionally so teams could have more input, they realized their current setup would be a challenge. There was no visual representation, so it was difficult to manage and troubleshoot. Sales wanted to make changes throughout the year, leadership wanted better tracking and the analytics team had issues with reporting. There were more exceptions than rules and no one could explain what was happening.

As with many GTM teams, there was very little communication or collaboration between Marketing and Sales. This led to mismatched expectations and competing priorities. Marketing had its own set of goals, metrics, and operational execution; Sales had another. BMC Software leadership challenged its GTM team to reinvent lead management.

The Operational Approach

When a problem gets too complicated, sometimes you have to start over. That's exactly what the BMC Software team decided to do. Building from the ground up, they migrated from Distribution Engine to LeanData to get more flexibility with lead routing and key metrics tracking. Education and training for the entire lead management team was also a top priority, including getting LeanData Certified.

They updated their legacy lead scoring model to speed up lead scoring time and re-defined the MQL model to only consider those who took a 'hand raising' action. Alongside the traditional model, they were able to add several AI scoring models to their lead management processes thanks to the flexibility of LeanData.

A big change for BMC Software was the addition of notifications and alerts through Teams. Alerts meant they could catch errors and unrouteable leads faster than ever. BDRs now receive alerts about high-value leads and SLA notifications to proactively stay on track.

They also piloted Buying Groups, associating new leads with existing open Opportunities. The Opportunity owner and others are notified via Teams to review and qualify the new Buying Group member and assign the correct Opportunity role.

Operational Results

Big changes bring big results. The Buying Groups pilot program matched 203 leads to early-stage opportunities and received a great response from the Sales team. One member expressed their gratitude because they received three director-level or above contacts related to a recently-assigned opportunity.

One year after implementing these changes, BMC Software is saving time and money thanks to consolidating its matching and routing programs.

Other positive outcomes include:

- 97% accuracy from routing thousands of leads.

- Decreased SLA for MQLs from 24 hours to 8 hours.

- Average lead response time of 150 minutes .

"Above all we reframed our perspective to shift from 'how can we meet the business metrics,' to instead focus on 'how can we provide the best experience for our customers and prospects.' This led us to focus on speed to lead, providing the fastest follow up possible and giving the team all the data they need up front."

Mike Letendre, Senior Marketing Programs Manager, BMC Software