



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

As a platform designed for connecting leading brands with buyers, Teikametrics knows the value of optimizing for revenue. When the team noticed inconsistencies with its lead management, it was time for a change.

Teikametrics faced significant challenges in qualifying Leads, scheduling demos, and managing the sales handoff process. Manual, error-prone workflows led to delays, inefficiencies, and misrouted Leads, causing friction between marketing and sales. Operationally, they struggled with data inconsistencies between HubSpot and Salesforce, leading to over 4,000 sync errors that disrupted workflows. Inefficient scheduling processes, fragmented lead source tracking, and inadequate event follow-up further hampered their ability to convert Leads to Opportunities. The overall lack of automation and system integration resulted in lost Opportunities and undermined their marketing efforts.

The Operational Approach

When it became clear that these challenges weren't sustainable, team members from RevOps, Sales, and Marketing joined forces to create a cross-functional project, known as the "Foundation Initiative." This cross-functional team created an action plan to address their GTM issues and gain leadership buy-in for the proposed solutions. Ultimately, the Foundation Initiative aimed to align Sales, Marketing, and RevOps to create a unified strategy that would tackle inefficiencies at each stage of the funnel.

To restore order, the Foundation Initiative identified four primary root problems: 1) database mismanagement, 2) form fields and qualification status misalignment, 3) mistrust regarding Lead quality, and 4) unclear lifecycle stages.

To address database inaccuracies, the team focused on eliminating duplicate records, standardizing fields, enriching data, and fixing over 4,000 sync issues between Hubspot and Salesforce. Consolidating 800+ forms into a single universal form simplified field mapping to ensure campaign alignment across Hubspot and Salesforce.

Database issues contributed to a lack of trust between Sales and Marketing. They addressed this by introducing a lead scoring model to align GTM outcomes. Finally, the team implemented LeanData BookIt to automate meeting booking with the right rep. They also leveraged BookIt at events, ensuring a next meeting before the prospect even left the booth.

This comprehensive approach by the Teikametrics team was designed to solve immediate problems and create a sustainable framework for future growth and success.

Operational Results

The work of the Foundation Initiative was a great success! They improved data quality by clearing out 1,100 outdated lists in Hubspot, over 39,000 outdated or invalid Contacts across HubSpot and Salesforce, and 11,000 duplicate accounts. Creating a universal lead capture form streamlined previously complex lead capture and enabled a reliable automated booking process.

Other positive outcomes include:

- 17% increase in conversions from event Leads.
- +133% year-over-year increase in MQL-to-Opportunity conversion efficiency.
- Automated meeting bookings, freeing up a dedicated resource to monitor.

"Within our cross-functional team, we have decades of experience in tech companies and startups. While the outcomes speak for themselves, the collaboration across teams led to greater buy-in from leadership and allowed us to dedicate the necessary time and resources to this project."

Scott Filip, Senior Manager of Go-To-Market Strategic Operations, Teikametrics