LEAD MANAGEMENT AT ITS BEST! HOW SYNTAX GENERATES 50% OF ITS NEW CUSTOMER BUSINESS WITH EVALANCHE

What began in 2015 with a last-minute Christmas mailing at Syntax, an international IT service provider in the field of cloud services, is now a professional marketing automation solution including multi-stage lead nurturing and sophisticated lead scoring. Thanks to e-raumwerk, expert in the implementation of marketing automation processes, in cooperation with Evalanche, the IT specialist has successfully raised its lead management to a new level. Not only do numerous promising leads reach the sales pipeline via the automated campaigns. They are also „nurtured" in such a good manner that 50 percent of new customer orders are generated directly through them.

Syntax is an internationally active IT service provider specialising in cloud services and consulting. With around 1,500 employees at 15 locations worldwide, seven of which are in Europe, six in America and two in China, Syntax supports especially companies from the industrial SME sector to tackle their various IT challenges. The IT specialist introduces its customers to S/4Hana, helps them with their digital transformation through SAP in the Industrial IoT (Internet of Things), and provides advice on the operation of SAP in the private, public and hybrid cloud. In doing so, Syntax scores not only with extensive know-how and many years of experience but has also been recognised as a Trusted Partner (SAP) several times. Syntax customers, including Heraeus, Julius Berger and NKT, always know how to get the most out of their IT investments, now and in the future.

PROJECT FACTS

Industry:
IT service and managed cloud

Company:
Syntax Systems GmbH & Co KG

Company size:
approx. 1,500 employees

Project focus:
Lead generation and management, marketing automation

Systems involved:
Evalanche, Salesforce, HubEngine (Marini)

Highlights:
Multi-level lead nurturing and lead scoring, sales automation

Objectives:
Create lead management processes, fill the sales pipeline, and generate new customer business

Challenge:
Start lead management and marketing automation from scratch

Results:
Sophisticated lead management, demonstrable marketing influence on sales pipeline and 50 per cent new customer business through lead marketing

THE INITIAL SITUATION

Sophie Westphal, Head of Marketing Europe at Syntax Systems GmbH & Co. KG (Source: Syntax Systems GmbH & Co. KG)

When Syntax planned to send a Christmas mailing to (potential) customers in December 2015, it turned out to be more complex than initially expected. The IT company had acquired Evalanche, a powerful email marketing and marketing automation tool, a while ago. However, besides the acquisition it has not been used. As a result, Evalanche was neither fed with appropriate data nor was Syntax familiar with its operation. In addition, personnel and time resources were severely limited in the weeks before the Christmas holidays. „On the recommendation of SC-Networks, we approached e-raumwerk with our request," recalls Sophie Westphal, Head of Marketing Europe at Syntax Systems GmbH & Co KG. "We immediately saw eye-to-eye and spoke the same language." With the support of e-raumwerk, who to set up the email marketing and managed the data cleansing from scratch, the Christmas mailing finally went out successfully. This was the initial spark for Syntax to get more involved with the topics of marketing automation and, above all, lead marketing. The main reason for the managed cloud provider was the fact that they saw great potential in it to drive its lead generation and to win new projects for its consultants.

THE REQUIREMENTS

Juan Manuel Kehder, Senior Marketing Manager Campaign Automation at Syntax Systems GmbH & Co. KG (Source: Syntax Systems GmbH & Co. KG)

„For us, there was never any question of whether we wanted to continue using Evalanche or another tool," emphasises Manuel Kehder, Senior Marketing Manager Campaign Automation at Syntax Systems GmbH & Co KG. „What we liked about Evalanche from the start was the fact that it is a German provider and is operated in German data centres, especially since in the meantime data protection has become indispensable. It was also important for us to have a tool that we could easily operate ourselves with little experience, so that we didn't have to depend on an external service provider. The price-performance ratio of Evalanche was very convincing."

THE IMPLEMENTATION

Marcus Köhler, Managing Director and Founder of e-raumwerk GmbH (Source: e-raumwerk GmbH)

To gain a foothold in the field of marketing automation, it was necessary to proceed step by step. „We focused less on the technology itself and more on the actual processes," explains Marcus Köhler, Managing Director and founder of e-raumwerk GmbH. „We always give this advice to all our customers, since it has proven itself in practice." Following on from this, Marketing, Inside Sales and Sales came together to create clear definitions, define processes and formulate goals together. In particular, the lead handover, which is often a critical point between Marketing and Sales, was discussed and a detailed process defined. At the same time, Syntax and e-raumwerk drew up a service level agreement (SLA) in which services and responsibilities are stipulated.

Introducing dynamic mailing templates and an extensive download centre

Download centre with useful content. (Source: Syntax Systems)
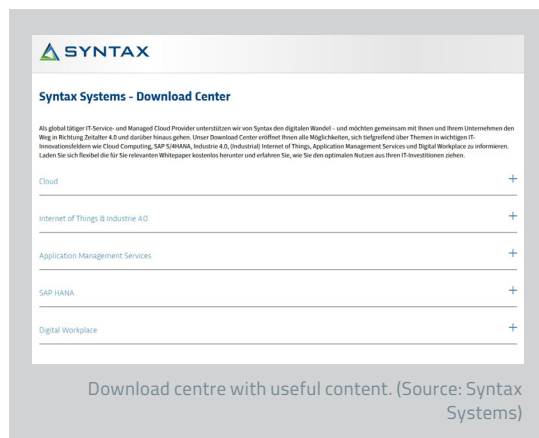
Once the framework conditions had been established, it was time to get down to the nitty-gritty work in terms of content and technology. In order to be able to send mailings that fully correspond to Syntax's ideas, the managed cloud provider developed requirements in collaboration with e-raumwerk, implemented them in the standard template and thus created an individual template. Particular attention was paid to ensuring that content could be generated dynamically. Subsequently, a download centre, that provides useful content on the five core areas of Syntax - i.e. Cloud, Internet of Things & Industrie 4.0, Application Management Services, SAP Services and Digital Workplace, was implemented on the website. There, interested parties and prospective customers can download numerous white papers, studies and webinar recordings for free, simply by providing contact details. „Our download centre is completely based on Evalanche," explains Manuel Kehder. „When a prospective customer fills out and sends a form, his data directly flows into Evalanche. We not only see which content he has downloaded and from which landing page. His action also triggers an automated campaign including multi-stage lead nurturing and scoring, only after a confirmed double opt-in, of course."

Multi-level lead nurturing and scoring are a must

Activity scoring can be used to filter out „hot" leads. (Source: Syntax Systems)
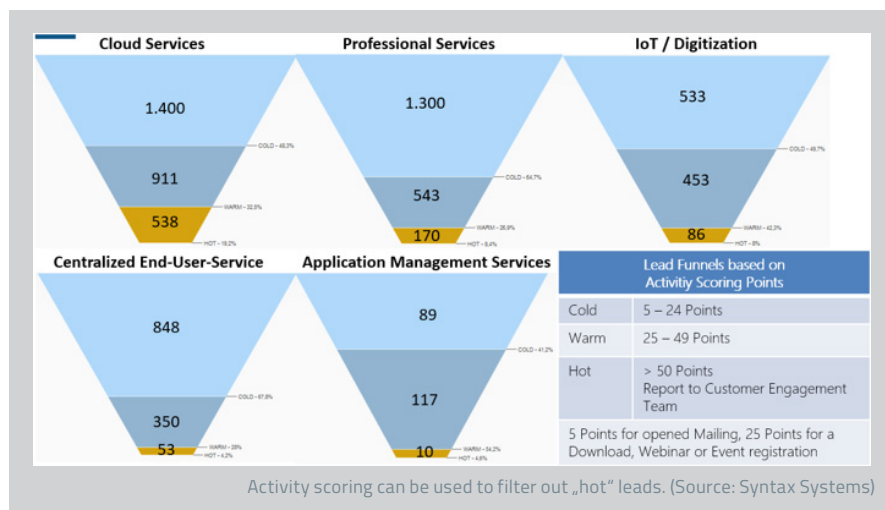
In total, there are five automated campaigns, which are also called core initiatives. While the core initiatives from the areas of IoT & Industry 4.0, Application Management Service, SAP HANA and Digital Workplace have a three-stage lead nurturing process, the campaign on the cloud itself has five stages. Facebook, Google and LinkedIn ads are used to promote the content and lead interested parties to the corresponding landing page. The starting point of the respective core initiative is the download of any content from the topic area. Queried data fields, such as industry and domain identifiers, are automatically checked according to defined parameters, and leads are classified as suitable or unsuitable. „If, for example, a student downloads one of our whitepapers, Evalanche recognises this on the basis of his e-mail address. Since students do not belong to our target group, they are disqualified as leads and are not included in the lead nurturing process," explains Manuel Kehder. On the other hand, a qualified lead receives a mailing one week later that offers them in-depth content and also draws their attention to interesting topics and products. If they click on these, another mailing follows. If they do not do so or do not open the mailing at all, a reminder e-mail is triggered. If the prospect downloads content from one of the other core initiatives, they can move on to this campaign. In the course of lead qualification, defined scoring values are also assigned for action. For the first content download, a potential new customer receives 25 points and is thus considered a „cold" lead. Every further download gives 25 points, and clicking on individual mailing items five points. A lead is considered „warm" in the range of 25 to 49 points and „hot" if it exceeds 49 points.

LEAD ROUTING WITH EVALANCHE

The success of lead management in B2B highly depends on lead routing, i.e. the smooth transfer of qualified leads from marketing to sales. If a B2B company makes mistakes at this critical point, it loses potential customers just before closing, even if they are ready for sales thanks to lead nurturing and lead scoring. With Evalanche, the process of lead transfer can be completely digitised and automated, both in terms of content and technology. Lead routing can for example be realised in the form of a reporting email containing all relevant lead information, which Evalanche automatically sends to the sales manager or a suitable sales employee when the condition for sales maturity is met. This can happen either when a certain lead score is reached or when the lead takes a specific action, for example a demo request. Another possibility is to realise the lead transfer by means of an interface between Evalanche and the CRM system. Evalanche offers numerous APIs and connectors for this. Data cleansing, data mapping and real-time synchronisation up to definable synchronisation intervals ensure smooth interaction and seamless information.
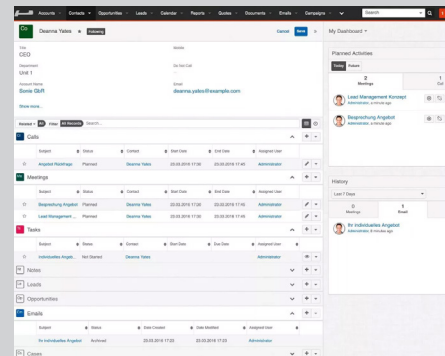
Hot leads flow directly into CRM

If a potential customer reaches 50 points, he automatically flows from Evalanche into Salesforce, which is connected via Marini's HubEngine, and is created as a lead. Detailed reporting provides Sales with information about which ad the prospect came through, what their initial download was, their activity history, and what their last activity and/or download was. In order to ensure a timely conclusion, Syntax has set up further processes. Individual time periods are defined for each area, such as four weeks for consulting and 18 months for cloud services. If the leads are not completed within this time, they are returned to Evalanche - including the reason. Their score is reset, and the contact is newly generated.

THE ADVANTAGES

„We definitely exceeded our goal of driving lead generation with the help of marketing automation and winning new projects for our consultants," says Sophie Westphal. „Not only do we have a proven marketing influence on the sales pipeline. Rather, 50 percent of our new client business is fed by lead marketing. We owe this success especially to the active support of e-raumwerk and, of course, to the innovative and user-friendly marketing automation tool Evalanche. Everything Evalanche has launched so far makes a lot of sense." For the future, Syntax plans to maintain the high standard of its automated campaigns and to drive further performance improvements and optimisations. A big future dream of the managed cloud provider is to build a comprehensive data platform including business data to ensure even higher data quality as well as to serve potential customers even better, true to the motto: „Dream big, start small, act now".