

## WHITE PAPER

### IVR for B2B Marketing: New Strategies for Lead Generation, Scoring, and Nurturing

## Executive Summary

In the past, most B2B marketers familiar with IVR (interactive voice response) thought of it as the automated greeting people hear when they call a business. IVR served as a virtual receptionist that directed callers to the right department: “Press 1 for sales, press 2 for support, press 0 for an operator.”

And while some B2B marketers might record promotional messages for the IVR to play for callers on hold, IVR wasn't thought of as a true marketing asset. Not in the way your email software and web site are. IVR was more of an afterthought – a tool that lived in IT, was difficult to change, and had limited marketing benefit.

But the role of IVR in B2B marketing and lead generation campaigns is undergoing a change. Thanks to the rise of voice-based marketing automation technologies that make it easy for marketers to create their own customized IVRs, the role of IVR is being reimaged. For many lead generation experts, IVR is now an integral piece of their marketing campaigns.

This white paper explains some of the IVR strategies today's B2B marketers are using to generate, qualify, and nurture sales leads. It also discusses how voice-based marketing automation solutions have made it easy for marketers to integrate targeted IVR programs into their campaigns.

## An Introduction to Inbound and Outbound IVR

IVR stands for interactive voice response, and it isn't a new concept. Companies have been using IVR since the 1970s. It's a technology that enables a computer or hosted system to recognize human interaction, either by telephone keypad or by speech recognition.

The two basic types for IVR are inbound and outbound. Inbound IVR, referring to an IVR that fields incoming calls, has typically been used to route callers in an organization's call center. Outbound IVR is an automated, phone-based communication where the person receiving a call is prompted to interact with the IVR.

### The Traditional Role of IVR in B2B Lead Gen Was Minimal

In the past, IVR has not played a pivotal role in B2B lead generation. A company's inbound IVR greeting was owned by IT, not marketing. It was inflexible and difficult to customize. The IVR system also lacked the ability

to automatically tailor content based on each caller's demographic information and purchase history.

So most companies either set up a single, rigid IVR to handle every incoming call, or else they created department-specific IVRs (one for callers to the sales hotline, one for callers to technical support, and so on). Marketing could then supply a series of recorded messages to play to callers on hold. Most marketers never thought about the IVR system until it was time to refresh those messages.

Likewise, outbound IVR has never been perceived as an integral tool for B2B marketing. It did gain popularity with some B2C telemarketers in the 1980s, but because of overuse and abuse, also gained a reputation as an intrusive technology.

The United States responded in the 1990s by passing laws to regulate outbound IVR, making it illegal to send IVR broadcasts to people without their consent. Those laws – and the emergence of email as a way to automate the deliver of marketing messages to large audiences – helped make outbound IVR irrelevant for B2B campaigns.

## Why IVR Is Becoming Popular in B2B Marketing

Today, however, the use of IVR in B2B marketing is experiencing a resurgence. Marketers are now integrating both inbound and outbound IVR in their demand generation plans, and using IVR to generate, score, and nurture high-quality phone leads.

So what's changed? First, voice-based marketing automation technologies (covered later in this document) have emerged to make it easy for marketers to create personalized, campaign-specific IVRs in minutes. The IVR

solution is no longer an inflexible, rigid tool that requires IT to update.

Second, while email is still the most popular form of outbound marketing, email's popularity has become its biggest drawback. Too many marketers are using it. Your message is one of hundreds your prospects get each day. It's too easy for your messages to get lost and ignored. So marketers have started using IVR to circumvent cluttered email inboxes and reach prospects directly.

Third, B2B marketers know that not all leads are created equal. And while white paper downloads and webinar registrations are excellent vehicles for generating leads, those prospects are often just beginning their research. More than likely they aren't ready for a sales manager to engage with them.

Phone leads are different. Someone who calls you is often further along in the buying process. They have specific questions they need answered before making their decision and need to engage with a sales rep right away. It's why phone leads are often the most prized by sales (see Figure 1).

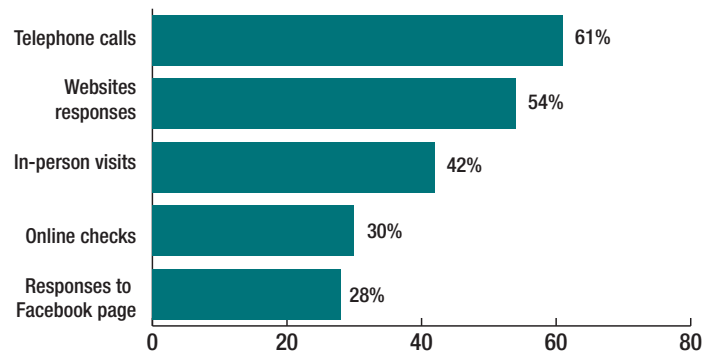


Figure 1: Larger percentage of SMBs rate telephone leads as "excellent" or "good" – more than any other lead type<sup>1</sup>

# New IVR Strategies for B2B Lead Generation

Here are some strategies for using IVR that marketers today are employing to help with lead generation, scoring, and nurturing.

## Strategy #1: Campaign-Specific Inbound IVR for Scoring Calls

Fundamentally, most B2B lead gen campaigns work the same way:

1. You create a compelling marketing asset, such as a new research report, webinar, or free software trial.
2. You secure it online by building a landing page and placing the asset behind a registration form.
3. You drive people to the asset using email blasts, advertising, web links, and social media.
4. You score the leads based on various factors, such as their company, job title, past interaction with your business, and responses to the qualifying questions on your form.
5. You pass the leads that score high enough on to sales to call, while the others you either place in nurturing campaigns or store for use in future campaigns.

A common side effect of all this marketing activity is an increase in inbound sales calls. B2B marketers often include a secondary call to action of “call us now” in their promotional emails, ads, and web pages. But even if you don’t, leads with questions will still track down your sales number and call you.

And this is a great thing. You want to generate those inbound calls that sales teams find so valuable. The problem, though, is that these callers are going straight to sales without getting qualified by marketing. And while many are worth passing through to a sales rep, many might not be. You don’t want to waste your reps’ time by getting leads to call in who aren’t sales-ready.

That’s why many B2B marketers have started inserting an extra step in their lead gen campaigns:

- 2a. Insert unique phone numbers prominently on all marketing materials that will take callers to a campaign- specific IVR for qualification.

Inbound IVRs are ideal for scoring phone leads. The IVR will ask callers the questions you determine work best to qualify them for your particular campaign. For example, if you are using the BANT (budget, authority, need, timeline) model to qualify leads, you can pose those questions to learn if callers are really ready to buy. Or you can find out from your sales managers what questions they care about in order to qualify leads, then pose those questions to callers.

Leads that score high enough are passed from the IVR directly to sales for an immediate conversation. Others can hear a custom marketing message and be given the option of leaving a voicemail for sales. You can even send them to a second IVR if that works best for your campaign.

It's the same principle you use when inserting qualifying questions on your web forms. But the IVR results are better because leads passed to sales get connected in conversation immediately. With web leads you have to wait for a sales rep to open the lead, dial their number, and hopefully get them on the phone. That could take several call attempts, if it happens at all. With IVR, the conversation is instantaneous, and the lead doesn't grow cold.

## Why Are Phone Calls so Important in Sales?

**77%** of online adults say they would be interested in getting help from a real person before making certain online purchases.

**82%** say there have been times when they have not been able to get help from a real person.

**58%** have a question that cannot be answered by information on the web site.

**52%** of those who have not always been able to get the help they needed from a real person say it has affected their decision to not purchase the product.

Source: IMShopping and Harris Interactive Survey, August 2009

## Strategy #2: Outbound IVR for Nurturing Leads

Marketers know that not every lead is ready to engage with sales. This is especially true in B2B, where the products are often more complex and the sales cycles longer. That's why most B2B marketers use some form of email lead nurturing (such as drip campaigns, e-newsletters, or regular one-off email blasts) to get people to reengage and move down the lead funnel.

B2B marketers have also started using outbound IVR to nurture leads. It works like email, with leads opting in to receive phone calls about your relevant products, services, events, and promotions. The outbound IVR can actually serve the same purpose as both the email and the web form: it delivers your message and call to action like an email, but also registers leads and asks them qualifying questions like a web form, all in one phone call. Plus, the IVR can transfer leads directly to a sales rep for an immediate conversation, which is the ultimate goal of nurturing.

### DPS Uses IVR to Drive Revenue for their Clients

Dealer Product Services, Inc. is a provider of marketing solutions to over 1,600 automotive retail clients. DPS wanted to integrate voice broadcasting into its clients' CRM systems to automate phone calls to advertise warranty renewals, oil changes, and other services.

"We chose DialogTech due to their flexibility and their programming expertise," said Tim O'Neal, President and CEO of DPS. "They have helped us integrate our systems, streamline processes, and automate all of our call delivery."

Using DialogTech, DPS was able to generate more revenue to their clients while realizing a cost savings of 20%.



## Strategy #2: Outbound IVR for Nurturing Leads

You can segment your IVR call lists based on area code, product interest, or any other demographic – same as you would with email. You can personalize the content of each IVR based on a lead's information in your CRM system. And if your call goes to a lead's voicemail, the IVR will automatically detect it and record a special message of your choosing. All in all, it can be an effective complement to your email nurturing programs.

For example, if you are holding a series of workshops or user-group meetings in various cities, you can use an outbound IVR to automate the promotion and registration process. Leads in each area code can receive a customized IVR call alerting them to the upcoming event. If they are interested, the IVR can register them on the spot. You can even schedule another IVR as a reminder for registrants to attend. It saves your agents the time and effort of manually calling each lead.

Of course, all outbound IVRs must comply with voice-broadcasting regulations. It's no different than email blasts having to comply with CAN-SPAM laws. You can learn more about those regulations at <http://public.DialogTech.com/more/ftc-fcc-regulations/>.

## Strategy #3: Using Inbound IVR as a Marketing Asset to Generate Leads

Another interesting way B2B marketers are using IVR is by making it the asset in their calls to action. So for example, instead of sending out emails and running ads asking people to download your white paper, you can ask them to call a special number to interact with your IVR.

Some sample IVR calls to action include:

- **Survey:** "Take our brief phone survey to win an iPad."
- **ROI Calculator:** "Call now to learn how much money our software will save you."
- **Needs Analysis Report:** "Find out if your IT processes are in line with best practices using this free 3-minute analysis."

At the end of the call, the IVR can give them the option of speaking immediately to a sales rep. You also capture all their contact information and IVR responses for use in future marketing campaigns.

## Strategy #4: IVR for Upselling, Cross-Selling, and Renewals

Depending on your business model, you may have marketing campaigns geared towards upselling to a higher product version, cross-selling to a complementary product line, or driving renewals for an expired product or contract. Outbound IVR is ideal for each of these campaign types.

It's a popular technique in the B2C world, where they use IVR to:

- Remind patients to reorder their medicine
- Alert people when out-of-stock products are back on the shelves
- Alert cruise travelers of cabin upgrade promotions
- Inform season ticket holders that playoff seats are available for purchase

The same strategies apply to B2B marketers. For example, if you sell products to businesses that require reordering, automating the reminder process with an outbound IVR can be a real cost-saver. The IVR automates an otherwise manual process, taking the customer's order and inputting it directly into your CRM. If the call goes to voicemail, the IVR can leave a customized message or put the number back in the queue to call later.

Using outbound IVRs for upselling and cross-selling can work just as well. The IVR can promote the relevant product or service, process the customer's order, and alert the necessary sales or order fulfillment staff.

And for leads that call your business, you can also use an inbound IVR to upsell or cross-sell your products and remind callers to renew or reorder. By integrating it with your CRM data, you can customize each caller's on-hold experience by playing promotional messages specific to their needs and buying history. If a message resonates, the caller can be connected immediately with a rep.

### Checklist of IVR Abilities for B2B Marketing

When investigating a solution for building IVR, B2B marketers should make sure it provides:

- ✓ Speech recognition
- ✓ Real-time analytics
- ✓ Voice-to-text transcription services
- ✓ Intelligent call routing
- ✓ Answering machine and human detection
- ✓ Ability to integrate with your CRM
- ✓ Online configuration with no programming

# Integrate IVR in Your Next Campaign with Voice-Based Marketing Automation

The main reason for the growth in IVR's popularity has been the recent availability of voice-based marketing automation technologies. Previously, the IVR system lived in IT and required technical expertise to update. It lacked the flexibility, personalization, and reporting capabilities to be truly valuable in B2B marketing campaigns.

But now, thanks to voice-based marketing automation solutions, marketing has software that makes it easy to integrate IVRs into their campaigns.

## Reasons for IVR's Resurgence in B2B Marketing

1. New voice-based marketing automation technologies give marketers full control of IVR.
2. Marketers need new ways to reach audience besides email.
3. Phone leads are still the most valuable to sales managers.

## Build Campaign-Specific IVRs in Minutes

Voice-based marketing automation solutions make it easy for marketers to build their own IVR in minutes. It doesn't require any technical expertise or IT assistance. The voice-based marketing automation software walks you through the entire IVR creation process. So for example:

- **For inbound IVRs that score leads:** It's simple to set up an inbound IVR with specific qualifying questions and custom scoring tailored to any campaign. You decide what scores get passed on to sales, and where to send low-scoring callers (to a voicemail box or another IVR, for example). The voice-based marketing automation solution even gives you unique, trackable phone numbers to include on your marketing materials that send callers to your specific IVR.
- **For outbound IVR campaigns:** After configuring your outbound IVR, you can segment your call list based on a wide variety of criteria, including their location, company, job role, product interest, or buying history.

## Personalize IVRs with CRM Integration

Voice-based marketing automation solutions can integrate with your CRM system, so your inbound IVRs can play custom messages tailored to a customer's profile. You can also schedule outbound IVR notifications to automatically trigger and notify callers of important events or promotions that are highly relevant based on their CRM data.

## Route Callers Based on Campaign-Specific Criteria

Voice-based marketing automation solutions let you control not only which callers get passed to sales, but also where and to whom they get passed. You can configure each IVR to route callers using a wide variety of options depending on the nature of your campaign, including:

- To agents in a specific order that you configure
- To several agents simultaneously on a first-answer basis
- To agents based on their territories, job titles, product specialty, or skillset
- To an individual agent's work phone, cell phone, landline, Skype, etc. simultaneously or in any order
- To specific agents or office locations based on the call's time of day

## Arm Sales with Valuable Caller Data using Agent Panels

The more information your sales agents have about inbound callers, the more successful the call will be. Voice-based marketing automation solutions enable you to set up an agent panel that displays not only the caller's phone number, but other important information as well, such as the Google search results that led to the call (see Figure 2).

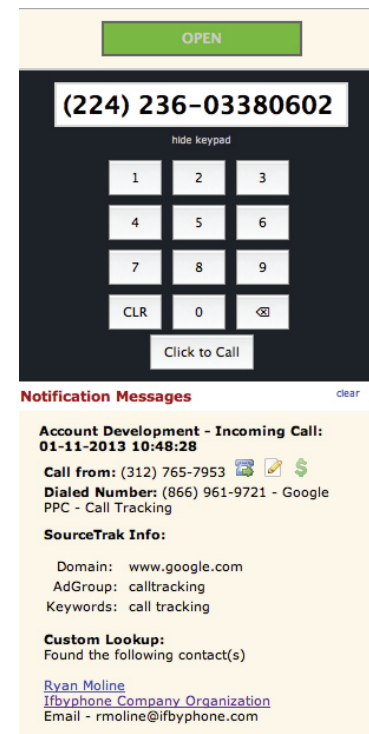


Figure 2. Agent panels arm sales reps with valuable data on incoming callers from IVRs

## Track Real-Time Data on IVR Performance

Everything in B2B marketing today needs to be monitored and measured. So voice-based marketing automation solutions let you view web-based reports that track the success of your IVRs in real time (see Figure 3).

For each IVR, you can view data on call counts, time, duration, caller geography, how they answered IVR questions, routing information, and more. You can also see which of your ads, web pages, referral sites, and SEO terms are driving calls to each of your inbound IVRs, so you know what's working and what isn't.

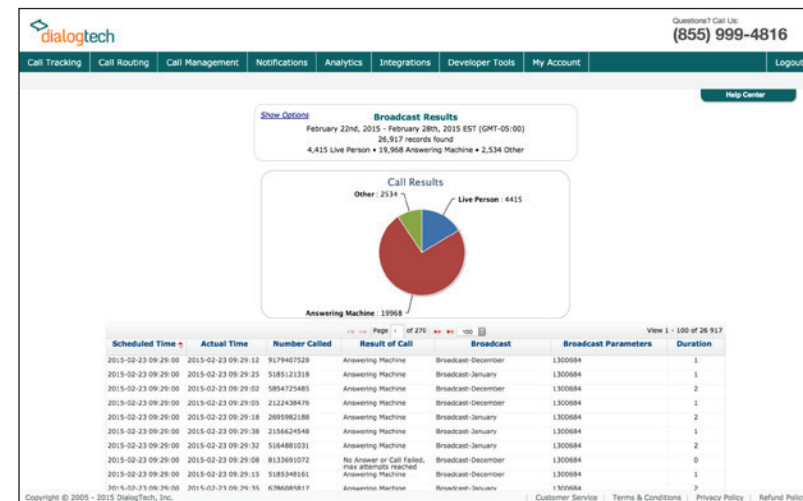


Figure 3: Sample web-based report for an outbound IVR broadcast

## Conclusion

The role of IVR in B2B lead generation campaigns is undergoing a change. Thanks to the rise of voice-based marketing automation technologies that make it easy for marketers to create their own customized IVRs, the role of IVR is being reimagined. For many lead generation experts, inbound and outbound IVRs are now an integral piece of their marketing campaigns.

### Next Steps

Call DialogTech's today at 855.351.0726 to learn how integrating IVR into B2B lead gen campaigns will help you grow revenue. You can also learn how successful marketers are using IVR at [dialogtech.com](http://dialogtech.com).

### Sources:

1. BIA/Kelsey report on Call-Based Ads, May 29, 2012

## About DialogTech

DialogTech manages, measures, and automates voice conversations with your customers and prospects. These conversations cannot be managed using marketing automation or CRM software alone. Without DialogTech's voice-based marketing automation platform, catching these interactions is like fishing with a hole in the bottom of your net – leads and information fall out.

The DialogTech suite is a set of software-as-a-service applications including ad tracking, lead distribution, hosted IVR, and voice broadcasting. Companies of all sizes and across all industries use DialogTech, including direct response, health care, real estate, home services, and lead generation. Learn more at **[dialogtech.com](http://dialogtech.com)**.

**[dialogtech.com](http://dialogtech.com)**

**Twitter:** [twitter.com/dialogtech](https://twitter.com/dialogtech)

**Facebook:** [facebook.com/dialogtech](https://facebook.com/dialogtech)

800.568.1121

300 West Adams Street, 9th Floor

Chicago, IL 60606