

## Optimizing Lead Processes with Far-Reaching Results

### I. BACKGROUND

Citrix Systems is the only enterprise software company focused solely on simplifying information access. Its solutions – based on the Citrix Access Platform - effect increased productivity, lower costs, better control of data resources, and improved operational agility.

Citrix has 2500 employees at offices in 22 countries, and more than 6200 channel and alliance partners doing business in more than 100 countries. Its Clients include all the *Fortune* 100 companies, 98% of the *Fortune* 500, and 98% of the *Fortune* Global 500, as well as hundreds of thousands of small businesses and individuals.

The company generates annual revenues of more than \$900 million. Based on 26% revenue growth from 2003 to 2004, Citrix ranked #70 overall and #6 in Infrastructure/Network Management in *Software Magazine's* Software 500.

### II. THE PROBLEM

Like most companies that experience sudden major growth, Citrix faced the prospect of creating greater marketing bandwidth with its existing infrastructure. Centralized reporting, and controlling expansion-related costs, became increasing concerns.

By late 2004 the Citrix Marketing Department, which feeds leads to the Citrix sales team and to numerous channel partners, had begun to feel overwhelmed. At the crux of its problems was a need to optimize its sales database.

This appeared a tremendous undertaking. Citrix Marketing gathers leads from a variety of sources – business reply cards, conference evaluation forms, trade show card swipes, online Web forms and industry associations, for example. Often, incoming information is illegible and/or truncated indecipherably. Because Citrix is a global company, foreign-language translation and country-specific standardization also were at times required.

To support its marketing managers - who are each responsible for the simultaneous execution of multiple marketing campaigns – Citrix had hired a major outside firm to process incoming leads. The firm received Word documents via email, then returned them in Excel format for review and uploading into the Citrix CRM system.

### Enough Is Enough

It became apparent, however, that in outsourcing Citrix had increasingly lost control of processes, reporting standards and costing:

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- Turnaround times were too long. It might easily be a week before processed leads were returned.
- Despite processing, duplicate information often was incorporated into the Citrix database, resulting in inflated lead counts across multiple campaigns.
- Often, program managers had to re-transmit files to the processing firm for error correction – further elongating the timeframe from lead identification to lead cultivation.
- Summarizing the number of leads produced per campaign required further conversion by Citrix.

Program managers found themselves spending more time with quality control, and less time with the marketing campaigns on which revenue creation relied. The department tried to work with the processing firm to resolve this situation but each time met with inflexibility.

### **III. THE SOLUTION**

The Marketing Department determined to seek alternative processing means and so solicited bids from several recommended vendors. markITelligence was one of those vendors and proposed a broad-based solution as part of its consulting services.

The three-tiered solution was based on mIT success in reengineering the workflow of other technology clients and encompassed process optimization, automation improvement and database management. Its centerpiece was a customized online lead processing system (OLPS).

As Traci Anderson, manager of e-marketing, explained the selection, “markITelligence had a clear understanding of our data needs. And we liked the consulting capability it offered as part of its marketing services.”

#### **A. Process Optimization**

To feed leads to the sales team adequately required faster turnaround and reliable lead quality. markITelligence addressed these issues through a strategic revamp of business processes.

The online system (OLPS) it created allows for transmittal of files in any format via a secure FTP site. This leaves Citrix email servers available for other tasks and minimizes required storage.

OLPS design allows for automation of basic lead information, list requests and immediate notification of appropriate personnel at various process intervals. It also incorporates one-click approval, various search modes and on-demand reporting based on campaign history, product interest, and prospect challenges, budgeting and timeframes.

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markITelligence provided a Service Level Agreement (SLA) that promises the return of data files in specified format within two business days – a significant improvement over the former situation. Also, as part of its lead management component, markITelligence assumed responsibility for all processing that results from Citrix direct mail programs.

### B. Automation Improvement

The OLPS gives Citrix program managers password-based access to a Web portal for smooth campaign setup, file transmittal and management reporting:

- A campaign setup form that automatically populates known information and allows additional entry of launch date, source codes and any special processing instructions
- Immediate upload and download capabilities
- Date and time stamping of each file that is transmitted or received
- Automatic email notification to program managers when a new file is received, and when it is returned and available for downloading
- Single-click approval that uploads processed files into the CRM system
- Optional scoring of leads based on Citrix-determined standards
- Automated requests for purchase of outside lists
- Searches by source code, time period, program manager and channel assignment, if any
- Automated reporting of duplicate and invalid records

Cost containment is no longer a problem. At any point in time, authorized managers can view campaign-specific details to see what tasks have been accomplished, and at what cost per file and per lead. Overall campaign costs also are available.

### C. Database Management

**Data Standardization.** Industry rules have been adopted that guarantee the standardization of all new information. As needed, mIT Teleprofessionals make phone calls to validate or revise ambiguous or incomplete information. Translation of information from Spanish or French into English is also a part of this service. Ultimately, Citrix receives processed data in case-appropriate Excel format.

**Data Scrubbing.** Besides information duplication, the inclusion of Citrix channel partners had previously inflated lead counts. Now, those channel partners are eliminated from all lead batches.

**Address and Phone Validation.** OLPS standardizes all US and Canadian addresses based on local postal requirements and validates them as deliverable. It also validates and updates all US area codes as required.

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**De-Duping.** Citrix uses unique campaign and source codes to manage and track all lead activities, so markITelligence also de-dupes lead records using those codes. Often, leads for a single campaign are received over a long period, which requires historic maintenance to ensure that each contact counts as only one lead.

**Record Suppression.** On a weekly basis, Citrix provides a list of contacts and companies to be excluded from new lead files. OLPS matches those records against company names, locations and email addresses.

**Appending.** To supplement information, incomplete records are mapped against the Citrix database and against MIT's own internal database.

**Lead Scoring.** Leads may be designated *A Hot*, *A*, *B* or *C*, depending on Citrix-defined guidelines. No score is assigned to leads that have inadequate information.

## IV. RESULTS

The overriding result for the Citrix Marketing Department is improved contribution to the company's competitive position, and thus its own reputation as an effective internal component.

According to Traci Anderson, "We successfully transferred our lead management processing to markITelligence. They were instrumental in hearing our needs, recommending solutions, and putting them into place in an abbreviated time. We now have one-stop lead management and reporting for all North American demand-generation campaigns."

- A. Reduced Time from Lead Identification to Lead Development.** Leads are fresher, so Citrix maintains continuing visibility with prospects. The sales team and channel partners have more immediate access to legitimate opportunities - including those leads most likely to close.
- B. Improved Resource Allocation.** The customized markITelligence solution has eliminated the need to transmit cumbersome files via email, increasing server utilization, available storage, and security.
- C. Centralized Reporting.** Mid-level and executive management now have on-demand access to the lead pipeline and its multiple metrics.
- D. Improved Budgetary Control.** Since a cost is assigned to each processed file, Citrix can at any point aggregate campaign pricing and relate impact to the overall marketing budget.
- E. Increased Strategic Focus.** Now, marketing managers are less involved with back-end lead processing and tracking. Freed from these tactical responsibilities, they are better positioned to create, implement and evaluate integrated campaigns.
- F. Enhanced Data Quality.** The data filters markITelligence provides – through standardization, scrubbing, de-duping, appending, validation,

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suppression and scoring – ensure that Citrix can account for every lead from every campaign.

“We no longer hear any complaints on turnaround times,” Anderson said, “as we did with markITelligence’s more expensive big-time predecessor. Our director of demand generation was extremely frustrated, and now she is thrilled with the positive transformation in morale and budget.”

Citrix Systems management considers the OLPS so successful, it has mandated that all new leads – even those generated by third parties – funnel through it.