SUMMARY OF THE INVENTION

The present invention relates to the assessment of performance data in the field of business-to-business sales and marketing. More specifically, the present invention relates to computer-implemented methods and systems for assessing performance data relating to an organization's ability create systematic, predictable and measurable demand.

In one example embodiment of a computerized method for assessing sales and marketing performance data in accordance with the present invention, a marketing automation platform is defined for receiving, analyzing, nurturing, and qualifying marketing leads and a sales force automation platform is defined for receiving qualified marketing leads from the marketing automation platform, receiving sales generated leads, analyzing the qualified marketing leads and sales generated leads, determining qualified sales leads from the analyzing of the qualified marketing leads and sales generated leads, and determining performance metrics of marketing efforts. At least a portion of the marketing leads received by the marketing automation platform are qualified based on objective criteria to determine whether the marketing lead is viable. The qualified marketing leads are then transferred to the sales force automation platform. At least a portion of the qualified marketing leads and sales generated leads are qualified as qualified sales leads by the sales force automation platform based on objective criteria to determine whether a sales opportunity exists with respect to each of the qualified marketing leads and sales generated leads. At least one rate of conversion is calculated based on at least a number of qualified marketing leads from the marketing automation platform and a number of qualified sales leads from the sales force automation platform. Attributes that effect said at least one rate of conversion comprise at least one of size of an organization, price point for sale of goods or services subject to the marketing lead, and geographical maturity of a brand related to the goods or services.

The sales generated leads may be provided to the sales force automation platform directly via a sales function which accepts user inputs from a sales team.

The sales generated leads may be combined with the qualified marketing leads for an overall determination of a total amount of the qualified sales leads.

The method may further comprise providing a user initiated marketing function which includes a teleprospecting function. The marketing function enables user interaction with the marketing automation platform. The teleprospecting function enables user generation of marketing leads and user nurturing of marketing leads that are not qualified by the marketing automation platform.

The method may further comprise providing a user initiated sales function. The sales function enables user interaction with the sales force automation platform and user generation of sales leads.

The qualifying of the marketing leads may comprise nurturing a marketing lead to an extent that indicates that the marketing lead is viable. The nurturing may comprise engaging the marketing leads by providing or obtaining information in order to enhance an opportunity to close business related to said marketing lead. The nurturing may comprise at least one of system-led and human-led communications. For example, the nurturing may comprise communication with a source of said lead comprising at least one of telephone calls, emails, direct mail, and the like to obtain or provide lead-related information.

The portion of leads received by the marketing automation platform may comprise a plurality of inbound inquiries and outbound inquiries. The inbound inquires may comprise requests to receive information and the outbound inquiries may comprise offers to provide information.

The qualified marketing leads provided by the marketing automation platform to the sales force automation platform is an aggregate of qualified marketing leads comprising a plurality of automation qualified marketing leads, a plurality of teleprospecting accepted marketing

leads, and a plurality of teleprospecting generated marketing leads. The teleprospecting accepted marketing leads comprises a portion of the automation qualified leads. A marketing service-level agreement specifies selection criteria for selecting said teleprospecting accepted leads from the automation qualified leads. A sales service-level agreement specifies selection criteria for selecting a plurality of qualified marketing leads from said marketing automation platform.

Once a qualified marketing lead or a sales generated lead is qualified as a qualified sales lead, the method may further comprise assigning a value coinciding with an anticipated monetary expenditure and assigning an anticipated sale date.

The marketing leads that do not become qualified marketing leads may be subjected to further nurturing.

The at least one rate of conversion may be used to determine anticipated sales based on a specified inquiry volume. As mentioned in the above embodiment of the computerized method, ~~Attributes~~ attributes that effect the at least one rate of conversion ~~may~~ comprise at least one of size of an organization, price point for sale of goods or services subject to the marketing lead, geographical maturity of a brand related to the goods or services, and the like.

The marketing automation platform and the sales force automation platform may be implemented as a computerized waterfall model.

In one example embodiment, a route-around may be provided enabling marketing leads that are determined to initially meet predetermined qualification criteria are provided directly from an automation qualified lead stage of the marketing automation platform to a sales accepted lead stage of the sales force automation platform. The predetermined qualification criteria comprises at least one of a predetermined qualification score (e.g., one that is particularly high), a determination that the marketing lead is from a strategic account, a determination that

the originator of the marketing lead desires to speak with a sales representative, or the like.

The present invention also encompasses a computerized system for assessing sales and marketing performance data. An example embodiment of such a system comprises a computerized waterfall model comprising a marketing automation platform for receiving, analyzing, nurturing, and qualifying marketing leads and a sales force automation platform for receiving qualified marketing leads from the marketing automation platform, receiving sales generated leads, analyzing the qualified marketing leads and sales generated leads, determining qualified sales leads from the analyzing of the qualified marketing leads and sales generated leads, and determining performance metrics of sales and marketing efforts. A computer with memory is provided which is in communication with the waterfall model. A database is provided which is in communication with the computer. A user interface is provided which is in communication with the computer. The computer, in connection with the database and waterfall model is adapted to: qualify at least a portion of said marketing leads received by said marketing automation platform based on objective criteria to determine whether the marketing lead is viable; transfer the qualified marketing leads to said sales force automation platform; qualify at least a portion of the qualified marketing leads and sales generated leads as qualified sales leads by the sales force automation platform based on objective criteria to determine whether a sales opportunity exists with respect to each of the qualified marketing leads and sales generated leads; and calculate at least one rate of conversion based on at least a number of qualified marketing leads from said marketing automation platform and a number of qualified sales leads from said sales force automation platform, wherein attributes that effect said at least one rate of conversion comprise at least one of size of an organization, price point for sale of goods or services subject to the marketing lead, and geographical maturity of a brand related to the goods or services.

The system is also adapted to carry out the various features of the method embodiments discussed above.

What is claimed is:

1. A computerized method for assessing sales and marketing performance data, comprising:

defining a marketing automation platform for receiving, analyzing, nurturing, and qualifying marketing leads;

defining a sales force automation platform for receiving qualified marketing leads from the marketing automation platform, receiving sales generated leads, analyzing the qualified marketing leads and sales generated leads, determining qualified sales leads from the analyzing of the qualified marketing leads and sales generated leads, and determining performance metrics of sales and marketing efforts;

qualifying at least a portion of said marketing leads received by said marketing automation platform based on objective criteria to determine whether the marketing lead is viable;

transferring the qualified marketing leads to said sales force automation platform;

qualifying at least a portion of the qualified marketing leads and sales generated leads as qualified sales leads by the sales force automation platform based on objective criteria to determine whether a sales opportunity exists with respect to each of the qualified marketing leads and sales generated leads; and

calculating at least one rate of conversion based on at least a number of qualified marketing leads from said marketing automation platform and a number of qualified sales leads from said sales force automation platform,

wherein attributes that effect said at least one rate of conversion comprise at least one of size of an organization, price point for sale of goods or services subject to the marketing lead, and geographical maturity of a brand related to the goods or services.

2. The method of claim 1, wherein:

the sales generated leads are provided to the sales force automation platform directly via a sales function which accepts user inputs from a sales team.

3. The method of claim 1 or 2, further comprising:

combining the sales generated leads with the qualified marketing leads for a determination of a total amount of the qualified sales leads.

4. The method of any of claims 1 to 3, further comprising providing a user initiated marketing function which includes a teleprospecting function, wherein:

said marketing function enables user interaction with the marketing automation platform; and

said teleprospecting function enables user generation of marketing leads and user nurturing of marketing leads that are not qualified by the marketing automation platform.

5. The method of any of claims 1 to 4, further comprising providing a user initiated sales function, wherein:

said sales function enables user interaction with the sales force automation platform and user generation of sales leads.

6. The method of any of claims 1 to 5, wherein said qualifying of said marketing leads comprises nurturing a marketing lead to an extent that indicates that the marketing lead is viable.

7. The method of claim 6, wherein said nurturing comprises engaging said marketing leads by providing or obtaining information in order to enhance an opportunity to close business related to said marketing lead.

8. The method of claim 7, wherein said nurturing comprises at least one of system-led and human-led communications.

9. The method of claim 7, wherein nurturing comprises communication with a source of said lead comprising at least one of telephone calls, emails, and direct mail to obtain or provide

lead-related information.

10. The method of any of claims 1 to 9, wherein:

said portion of leads received by said marketing automation platform comprises a plurality of inbound inquiries and outbound inquiries; and

the inbound inquires comprise requests to receive information and the outbound inquiries comprise offers to provide information.

11. The method of any of claims 1 to 10, wherein said qualified marketing leads provided by said marketing automation platform to said sales force automation platform is an aggregate of qualified marketing leads comprising a plurality of automation qualified marketing leads, a plurality of teleprospecting accepted marketing leads, and a plurality of teleprospecting generated marketing leads.

12. The method of claim 11, wherein said teleprospecting accepted marketing leads comprises a portion of said automation qualified leads.

13. The method of claim 12, wherein a marketing service-level agreement specifies selection criteria for selecting said teleprospecting accepted leads from the automation qualified leads.

14. The method of any of claims 1 to 13, wherein a sales service-level agreement specifies selection criteria for selecting a plurality of qualified marketing leads from said marketing automation platform.

15. The method of any of claims 1 to 14, wherein once a qualified marketing lead or a sales generated lead is qualified as a qualified sales lead, the method further comprises:

assigning a value coinciding with an anticipated monetary expenditure; and

assigning an anticipated sale date.

16. The method of any of claims 1 to 15, wherein the marketing leads that do not become qualified marketing leads are subjected to further nurturing.

17. The method of any of claims 1 to 16, wherein said at least one rate of conversion is used to determine anticipated sales based on a specified inquiry volume.

~~18. The method of claim 1, wherein attributes that effect said at least one rate of conversion comprise at least one of size of an organization, price point for sale of goods or services subject to the marketing lead, and geographical maturity of a brand related to the goods or services.~~

~~19~~18. The method of any of claims 1 to 17, wherein said marketing automation platform and said sales force automation platform are implemented as a computerized waterfall model.

~~20~~19. The method of any of claims 1 to 18, wherein:

a route-around is provided enabling marketing leads that are determined to initially meet predetermined qualification criteria are provided directly from an automation qualified lead stage of the marketing automation platform to a sales accepted lead stage of the sales force automation platform; and

the predetermined qualification criteria comprises at least one of a predetermined qualification score, a determination that the marketing lead is from a strategic account, a determination that the originator of the marketing lead desires to speak with a sales representative.

~~21~~20. A computerized system for assessing sales and marketing performance data, comprising:

a computerized waterfall model comprising:

a marketing automation platform for receiving, analyzing, nurturing, and qualifying marketing leads; and

a sales force automation platform for receiving qualified marketing leads from the marketing automation platform, receiving sales generated leads, analyzing the qualified marketing leads and sales generated leads, determining qualified sales leads from the analyzing of the qualified marketing leads and sales generated leads, and determining performance metrics of sales and marketing efforts;

a computer with memory in communication with the waterfall model;

a database in communication with the computer; and

a user interface in communication with the computer;

wherein the computer, in connection with the database and waterfall model, is adapted to:

qualify at least a portion of said marketing leads received by said marketing automation platform based on objective criteria to determine whether the marketing lead is viable;

transfer the qualified marketing leads to said sales force automation platform;

qualify at least a portion of the qualified marketing leads and sales generated leads as qualified sales leads by the sales force automation platform based on objective criteria to determine whether a sales opportunity exists with respect to each of the qualified marketing leads and sales generated leads; and

calculate at least one rate of conversion based on at least a number of qualified marketing leads from said marketing automation platform and a number of qualified sales leads from said sales force automation platform,

wherein attributes that effect said at least one rate of conversion comprise at least one of size of an organization, price point for sale of goods or services subject to the marketing lead, and geographical maturity of a brand related to the goods or services.