

# Setting Up an Effective Lead Lifecycle in Marketo for a Cloud-based Software Provider

## HIGHLIGHTS



Effective Lead  
Prioritization



Streamlined  
Lead Management



Improved Sales-Marketing  
Handover

## THE CUSTOMER

A leading provider of cloud-based software for K-12 education, the customer enables over 50 million students globally and more than 15,000 schools and districts in more than 90 countries to efficiently manage state reporting and related compliance. This includes special education, finance, human resources, talent, registration, attendance, funding, learning, instruction, grading, assessments, and analytics in one unified platform.

## THE CONTEXT

Without a clearly defined lead lifecycle, the customer was finding it difficult to understand where a lead stands in the buying journey. This was causing inefficient lead management. As their organization was growing, the customer was also finding it difficult to maintain and scale lead lifecycles. Additionally, incorrect and inconsistent definitions of lead stages and criteria for movement were causing misalignment.

## THE OBJECTIVE

The customer's objective was fourfold. First, to illustrate the current state of lead flow, define each stage of the lead lifecycle with a comprehensive and visually intuitive diagram, and delineate the criteria for moving leads from one stage to the next. Second, to ensure that the lead lifecycle is easy to understand as it scales to accommodate a growing number of leads.

Third, to make lead stages and criteria accessible to relevant teams and define the meaning and criteria for each lead stage. Finally, the customer wanted to implement a lead lifecycle model and scoring system that assigns a lead score based on the likelihood of buying.

## THE SOLUTION

With Grazitti's assistance, the customer was able to:

- We began by gaining an understanding of the customer's business model
- We then conducted an audit on the customer's existing lead life cycle stages, documented their needs, and built the scoring model
- We merged and omitted existing revenue stages, created a new revenue stage as per requirements (Example: Known, Inquiry, AQL, SAL, MQL, SQL, SQO, Closed Won), and applied them to leads through operational programs

## THE OUTCOME

With a clear understanding of lead flow, simplicity in design, consistency in definitions, and effective lead prioritization, the customer has been able to streamline lead management and improve their ability to convert leads to customers. In addition to this, the successful setup of a lead lifecycle in Marketo has enabled the customer to improve lead handover between sales and marketing.

