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# How to Turn Your White Paper Promo Into a One-two Punch to Generate Better Leads

*If you are marketing with a white paper, absolutely read this Case Study about a test campaign BearingPoint conducted this May.*

Includes samples of a microsite featuring not one but two interactive quizzes that generated super-qualified leads the sales department adored...

And surprising news, banners worked 10 times better than search ads:

CHALLENGE: "We have a pretty scientific approach to promoting our white papers," Paul Dunay, BearingPoint (NYSE:BE) Head of Marketing for Financial Services North America.

It's a good thing too, because he and his team have to crank out a huge number of campaigns to generate and warm-up sales leads of high-level execs in giant insurance, banking, and brokerage firms who might spend six to seven-figures on IT services a year with BearingPoint.

"So far this year I've done nine white papers, six solution overviews and five case studies. I have white paper brain melt," Dunay jokes. His 8-step white paper promo system includes:

o Step 1. Landing pages

BearingPoint's Web department sets up a series of nearly-identical landing pages — each with a unique URL — for Dunay to use when promoting a particular paper so he can track results and tweak copy for particular sources. Only one page is optimized for search engines though (otherwise mirror pages can appear to be spam and hurt your rankings.)

o Step 2. Press release

Dunay sends out a press release via PRNewswire, which includes a hotlink to one of the landing pages as high-up as possible in the copy. "I put it prominently in the second or third paragraph, people don't read further anymore."

The release is also optimized for Yahoo News and Google News by including keywords and BearingPoint's ticker symbol.

o Step 3. Post links on all company sites globally

o Step 4. Hotlinked notice in house email newsletter

o Step 5. Syndication via Bitpipe

o Step 6. Paid search marketing via Overture and Google

o Step 7. Internal marketing to the sales department

Dunay notes if you promote a new paper to sales reps before it actually launches, "it's all too airy fairy for them." So he waits a week or so he can tell reps how many downloads the paper's already had. Then he gives them their own download links to send prospects, and runs a webinar to train reps about the paper's topic.

o Step 8. Client & key prospect luncheon in New York

However, despite the fact that these eight steps are more effort than many marketers put behind a white paper, Dunay began to wonder this Spring if he was missing a critical final step.

"Our approach was well integrated and well-staged, but I was looking to take it to the next level. I don't believe a white paper download is a complete call to action. You can't call the lead tomorrow and book an appointment."

He continues, "I look for three interactions to score a lead in my mind from a general awareness of the BearingPoint brand to being something I would consider a near hot lead. I've got to move them up the chain."

What ninth-step could Dunay add to the white paper promotion process that got leads to interact with BearingPoint enough that they went from merely-aware to nearly-hot?

CAMPAIGN: The team reviewed one of Dunay's top white papers for Spring 2004, a 14-page PDF entitled "IT Telephony: Putting the Service Back Into Financial Services" (link to sample below.)

Then they had an "ah-ha!" moment — why not repurpose the content in the paper to create an interactive quiz on the topic? In fact, they wound up creating a microsite featuring two related quizzes for key prospects.

Quiz #1. Quick self-assessment

Entitled, "4-Step VoIP Self Assessment", this quiz was designed to take less than a minute to fill out. All the answers were quick check-boxes with yes/no answers so users didn't have to think or type much.

According to MarketingSherpa's IT Marketing Metrics Guide the average white paper offer landing page has an 89% abandonment rate when visitors have to register to get a free paper. Dunay wanted to get peak interaction from this first quiz, so he decided to make both the quiz and results immediately available to visitors without any barriers or strings attached.

It would count as a marketing "touch", and funnel traffic to the second quiz. "We wanted to give them something meaningful without slamming down the registration barrier."

Quiz #2. ROI Evaluation Tool

Dunay figured why not let prospects sort themselves into piles for the second quiz? The ROI evaluation was much more detailed, and did require a brief registration form to enter. However, prospects were promised more valuable data, and hopefully having taken the first quiz and/or read the white paper, would be willing to leap the barrier.

He notes the wonderful thing about offering an interactive ROI tool it gives your sales team an invaluable edge to open conversations. "If someone fills in the self-assessment, all I can see is you thought VoIP is a hot topic. If you fill out the ROI tool, I get all this data. I can see your potential ROI is $13 million and I can have our telesales give you a call to say we'd love to stop by and help you formulate a business case."

However, he cautions that you'll need to get your legal department involved prior to posting an ROI tool anywhere. "Our legal disclaimer is long. We can't guarantee this blah, blah blah, blah.... My agency and I both remarked on the volume of content that came from legal. It's almost a separate Web site."

The final microsite (link to sample below) featured a link to this disclaimer on the home page, that was clear but not so eyecatching that it would distract traffic from the main purpose — to take the quizzes.

The microsite was carefully designed with the visitor path in mind. Marketing copy describing what BearingPoint is, was tucked neatly at the bottom so the main body of the home page could be completely dominated by the click button to start the self-assessment quiz.

Dunay timed the white paper-to-quiz microsite transition carefully. First he ran his typical step-by-step promotion for the white paper from March 17th — April 30th. Then on May 1st, he launched the microsite with a similar promotion, including:

o Paid search marketing — "I tried the InStyle magazine approach with copy — the 5 hairstyles of the stars, the 5 hidden ROIs of VoIP."

o Text-link ads reading, "Ready for VoIP? Take the Self Assessment" and banners (link to sample below) which ran on CMP's TechWeb network.

o A luncheon for 27 top IT and corporate telephony execs at Le Cirque in New York — "The theory is you get a viral aspect out of the event because when attendees go back to work they tell people 'I was at Le Cirque'."

RESULTS: "We do have some great results to date," says Dunay. 27% of all microsite visitors took the first assessment quiz, and 25% of these on average then moved on to register and complete the second quiz, the ROI tool.

Plus, of the 73% of visitors who didn't take either quiz, a large number forwarded links to colleagues. "One of our largest sources of traffic was 'no source specified'. They were cutting and pasting the URL to send to friends." This was despite the fact that the site clearly offered a "tell a friend" link — people just prefer to cut and paste rather than going through a formal link. (We've seen this in many Case Studies.)

The text-link ads and banners worked fairly well, but the paid search marketing campaign didn't. Dunay feels this was because he used a fairly generic term — VoIP — for search ads and too many clickers just weren't qualified. The problem was with a less generic search term, the traffic would have been so tiny as to not be worth the trouble in his ultra-busy schedule.

He cut off the search campaign within 10 days and concentrated media buys on what was working. "The worst converter we had was Google, and the second worst was Overture. Text links on vertical sites were performing 10 times better."

Will he try this campaign again? Absolutely. "For the timing next time, I would say possibly wait a bit longer between the white paper promo. Let it breath. I'm a big fan of hitting the market hard — I like a lot of punch." But, if you're going for a one-two punch, perhaps a two-month spacing would do even better than 45 days.

Useful links related to this article:

Sample of quizzes microsite and the banner ad that led to it, plus the original white paper:
http://www.marketingsherpa.com/bearp/ad.html

e-tractions — the interactive agency that BearingPoint used to create the campaign and microsite:
http://www.e-tractions.com

BearingPoint
http://www.bearingpoint.com

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**04/14/2004**

# How to Use a Back-stage Blog & Virtual Community Networking to Maximize Your Road Show's Impact

*Are you planning a road show where you'll send a few company leaders in a tour to give presentations to groups of clients and prospects? Drop everything and read this Case Study first.*

Learn how Red Hat ran a global road show — sending execs to seven cities on six continents — that cost

CHALLENGE: "God forbid you actually get out and speak to customers in person and hear what they say," laughs Chris Grams Senior Manager, Marketing Communications, at Red Hat.

18 months ago, the Red Hat team did just that. Four staffers drove a souped-up RV across America, stopping in diners and coffee shops to meet casually with users of their technology who they'd emailed invites to along the way.

The tour was such a success that the team decided to do it again for 2004.

But in the intervening time, Red Hat had changed dramatically. Now it was a $115 million year company with enterprise customers including Morgan Stanley and AOL, many of whom were outside the US.

How do you impress clients and prospects in suits, while remaining true to your t-shirted fans in the user community?
Plus, what's the best way of handling the internal politics of a worldwide road tour, with HQ's team dropping into regions run by local offices?

Last but not least, how can you get the most bang for your road tour buck? Are there ways to use technology to reach more people than merely whoever you can squeeze into the meeting rooms?

CAMPAIGN: The tour took place from March 9th to April 1st, with formal gatherings in seven cities on four continents. First in February Grams posted an invitation in the company's email newsletter 'Under the Brim'. Local offices were also asked to help out, choosing venues, and emailing their own regional lists to invite attendees.

The team held three separate meetings in each region to please each constituency. First they did a presentation and Q&A for staff at the regional office. Then they held a presentation for enterprise clients and prospects at formal venue such as the Park Hilton in London. Then, often the same day, they held a user-group meeting either at the same venue or at a local university hall.

Every presentation began with a showing of Red Hat's official company video — it's under five minutes long. Next there were a few canned presentations, and then loads of Q&A.

Different speakers — Red Hat execs plus execs from tour co-sponsors IBM and HP — met the main team of five guys at each stage of the show. This helped keep everyone's energy high, and ensured that even canned presentations didn't sound canned the way they do when you've given the same speech too often.

Also, the team made a point of learning about their local office members in the first meeting, and then spotlighting them in client, prospect and user meetings afterwards. So, presentations always had a local angle and flavor rather than just focusing on HQ.

No matter how successful you are at getting people to sign up for your road show, your reach is obviously limited. Grams and the team used three outreach tactics to extend reach exponentially:

-> Outreach tactic #1. Write a Back-stage Blog (Link below)

A big part of Red Hat's brand is that it's an open source company. Grams took that to mean that communications should be as open, honest, and even human as possible, rather than "corporate-sounding."

"I want to give people the sense that Red Hat is made up of real people. You're not talking to a building, you're talking to an individual, and some pretty darn smart individuals at that. We're proud of that.

"I really believe if you talk in a real person's voice, you reach people in such a deeper way. We try not to make the message so watered down and so enterprise antiseptic that it appeals to no one. We may make at least a couple of people mad, but I'm hoping an enormous number of people feel a deeper connection."

So he set up a Blog (web log) on the site, and encouraged each of the five team members to post their daily impressions during the tour. He also invited guest bloggers to post, including speakers and local staff.

"The first internal reaction was, 'It doesn't sound enterprise enough.' People worried." But he persisted and got permission to test the project. "We posted whatever we wanted to. We had lucid moments and less than lucid moments."

Posts included everything from event Q&A session highpoints, and snapshots of local staffers, to jetlagged musings about how hard it can be to find the right hotel room in Boston.

-> Outreach tactic #2. Video the Entire Tour

The team also brought a videographer on the road with them for the entire tour, who shot almost 80 hours of meeting and backstage footage. "We didn't want to have the tour result in just us five guys knowing a lot about the state of Red Hat around the world."

Most important — after every session they grabbed a few attendees for one-on-one on-camera discussion, sort of like running an informal global focus group. That footage is currently being edited for sales training and product development brainstorming.

When Red Hat's rarely seen founder arrived unexpectedly at one of the events, the team videotaped a 30-minute interview with him too. "We'll probably be using that footage in company presentations for the next 50-years," Grams says happily.

-> Outreach tactic #3. Use Online Social Networking to Extend Your Reach

A few weeks before the tour began, the New York Times ran an article on how US presidential candidates were using an online social networking service called MeetUp to grow community and launch local real-world events.

Inspired, the Red Hat team decided they should try the system out. So, on March 1st, they launched the MeetUp Red Hat community and announced a "Global Meeting Date" of April 1st.

Anyone in the MeetUp free registered member base could sign up to be added to the list. Then as soon as five or more members emerged in a particular geographic location — such as Brisbane Australia or New York City — they were asked to choose a location for their meeting.

Because meetings were to take place anywhere in the world where there were five interested MeetUp members, and the meetings all took place at 7pm local time on April 1st, it wasn't possible for a Red Hat staffer at attend most of them.

However, Red Hat HQ hosted their own local group, plus the company site and email newsletter plugged events.

RESULTS: The total cost was "about 1/5th of what having a presence at a major trade show would be," notes Grams. But the impact was enormous — all told an estimated 1,500 customers, prospects and users attended the formal tour events.

Although on average roughly 50-75% of RSVPed people actually attended the tour events, in some countries such as Asia and Australia, attendee rates ran over 100% because so many people brought along friends.

Unexpectedly, many of the corporate suit-types who attended the "enterprise" meetings decided to follow the team to the user-group meeting, spending four-to-seven hours attending presentations and Q&A sessions. That's why you'll see suits and t-shirts mingling in the snapshots posted to the Blog (link below.)

An average of 3,000-5,000 people per day read the latest Blog entries. The "honesty" in the Blog entries made a few folks at HQ nervous, especially those who'd previously worked at more formal enterprise software companies. But the readers themselves seemed to appreciate the voice. And now other Red Hat execs, including the CEO, are planning to launch their own Blogs.

As of this writing more than 1,400 fans have joined Red Hat's MeetUp community with the express intention of attending local meetings around the world. MeetUp events lead by local volunteers went as scheduled around the globe on April 1st.

Grams was fascinated to see fervent interest in cities in India, Korea, Malaysia, and other places the world tour never touched. It's definitely affecting his route ideas for future tours.

Only next time he'd like a little more time to put the tour together — this time the team pulled it off with just three months' warning. "Ideally I'd love to plan something like this a year out."

Useful links related to this article:

Red Hat's Blog for the World Tour:
http://www.redhat.com/worldtour

Blog entry with photos
http://blogs.redhat.com/archives/000049.html#more

Moveable Type — the low-cost software Red Hat used to power the Blog
http://www.movabletype.org/

Red Hat's MeetUp page:
http://redhat.meetup.com/

MeetUp
http://www.meetup.com

MarketingSherpa's past Case Study:
"How Red Hat Has Kept its Email Newsletter Open Rates Higher Than Average for Four Years in a Row"
http://library.marketingsherpa.com/barrier.cfm?ContentID=2385

2002 Road Tour Journal featuring Red Hat RV
http://www.redhat.com/roadtour/

04/07/2004

# 5 Best Practices to Create a High-impact Sales Lead Generation Web Site

*If you think your Web site or landing page could generate more sales leads than it currently does, you definitely should check out this new Case Study. It includes details on how a software company used these five Best Practices...*

1. Home Hero spot Links for Both Kinds of Prospects
2. Building Trust With Loads of Client-Peer Mentions
3. Multiple Offer Options to Garner Leads
4. Personal Touch with Zip Code Search & Rep Photos
5. Watching Live Visits to Determine Final Tweaks

... to garner the highest possible conversion from visitor to registered lead:

CHALLENGE: Misys Healthcare Systems is one of the top five healthcare IT companies in North America, with more than 2,600 employees. As any marketer knows, managing sales lead generation programs for a company this large has its upsides and downsides.

On one hand, many prospects have probably heard of you. Plus, you have a sales team in 60-locations who are ready to spring on leads when you generate them.

On the other hand, it's hard to do nimble online marketing tests when you've got a big IT department busy with loads of other projects, a fancy existing, general-purpose, corporate site, and years of traditional marketing ideas to overcome.

"Do doctors even search the Web looking for medical records software?" one executive wondered. "I thought they just checked their stock portfolios online."

Every Net project needs an internal evangelist — in this case it was Misys sales rep Jennifer Nichols. She'd won the President's Club Trip for 2003 and wanted to test her wings on something entirely different.

Together with an outside developer, she put together a pitch to convince senior management to let her try a test project.

This internal pitch was as carefully crafted as any outside sales call she'd ever put together. With help from the marketing department's intranet, Nichols pulled cost-per-lead data on each of the traditional marketing tactics, such as trade show booths and direct postal mail.

Then she created a PowerPoint slide comparing this to the number of online searchers for terms related to software like Misys's and what the per click cost would have been if Misys bought search terms and/or optimized a site for search. "We're spending $60-70 per lead generated on direct mail, but we could be number one in Overture for just $9 a click."

Management was impressed enough to ok a test project. Nichols had a tight budget and a deadline of 60-days to launch a lead generation site and prove the Web could work.

CAMPAIGN: Nichols put together an outside team of a copywriter, a Web designer, and a programmer to help her create the new stand-alone Web site that would function as a lead generation tool.

(Note: Why not just tweak the existing corporate site? Because it had a general information role to serve, and served it very well. A separate site meant leads wouldn't be distracted by non-pertinent click paths. Plus, it was easier and cheaper to create a new site than work within corporate bureaucracy to alter the existing one. All of these factors are probably true for many large companies.)

The team used five specific best practices to make the site as high-impact as possible:

Best Practice #1. Home "Hero spot" Links for Both Kinds of Prospects

Nichols knew that she'd probably get search traffic from prospects in two distinctly different parts of the sales path — people who researching electronic medical records software in general, and people who had narrowed their research to picking the best system.

Web sites that try to serve two different audiences like this often fail, especially for search-results clickers who want to see content that applies directly to their needs within seconds without poking around for it.

The team's solution was to place two big links in the "hero spot" of the home page below the logo. One read, "Why EMR? Find out more here." The other said, "Why Misys? Find out more here."

So, no matter which kind of prospect you were, your path was immediately apparent.

Best Practice #2. Building Trust With Loads of Client-Peer Mentions

Nichols knew from in-person sales calls that prospects always want to know, "Who else is using this software? Is their practice like mine?" So, almost 50% of the home page was dedicated to elements proving Misys is popular with prospects' peers.

Because peer-use was such an important point, the design team included information in three different visual styles to catch the eye of prospects no matter what their preferred site-scanning method was:

— For "readers" the headline and body copy expounded on how many practices use the Misys system.

— For "people who like people" the designers posted four headshots of actual clients along with their testimonials.

— For "newshounds" the home page featured an 'In The News' section that looked like a typical corporate site list of news releases... but instead each story was about a new, named-client who'd just selected Misys.

Best Practice #3. Multiple Offer Options to Garner Leads

Nichols thought it would be foolish to rely on a one-size-fits-all offer. So, the team developed six different interactive offers:

- o A White paper to download
- o An ROI calculator
- o An online demo
- o 'Request a free CD-ROM' offer
- o An in-person demo
- o A sales rep contact

Because the site was going to be promoted via both paid and optimized search marketing, Nichols knew that incoming traffic might easily bypass the home page, and enter on a completely different page. So, the team made the tidy list of six offer links a permanent part of the top right column on every single page of the site.

No matter where you entered or surfed, you could respond by in one quick click to get the offer of your choice.

Best Practice #4. Personal Touch with Zip Code Search & Rep Photos

If you've got a big outside sales force, why not flaunt it? Misys' HR department had photos of all employees already databased, so the Web team borrowed them to create a great feature we've never seen before — a "Meet Your Local Support Team" interactive tool.

Visitors simply typed their zip code, clicked, and saw smiling faces and contact info for the reps in their local area.

The team also hoped this functionality would raise the site's search engine visibility because now the site had a page for every zip code in America. And the more pages you have, in general the more likely it is you'll be found and indexed under more terms by search engine spiders.

Best Practice #5. Watching Live Visits to Determine Final Tweaks

Although the site was developed with a Web analytics package, the team didn't want to wait for reports to find out how they were doing and determine what to tweak to improve results.

So they jerry-rigged an informal focus group to see how real-life visitors would interact with the site in real time.

How? Turns out if you install some (very) low-cost chat messaging software on your site, you can use its real-time reporting function to view exactly what search engine page the visitor found your link on, and how that visitor then moves through your site. (Link to software below.)

Note: The team didn't actually use the software to chat with anyone, or to even visibly offer people the option to chat. Instead, they just used it for this nifty, easy-to-view, reporting function.

Then they tweaked both the site navigation paths, and the paid search terms chosen, based on results. (Learning which terms qualified prospects find you under in "organic" results is a great way to discover terms to buy paid results under.)

RESULTS: "The site launched five months ago, and it's definitely successful," says Misys' Marketing Communications Manager Mike Truell. "It's now the model we're using with the rest of the sites we're putting up. There are a lot of elements we want to incorporate into our main site as well."

Turns out people love having their choice of offers:
  19% of visitors click on the ROI calculator offer
  20% click on the white paper offer
  49% click on the link to the online demo

Plus, by watching the live visitor info, the team learned that multiple offers may be crucial to a site's success. Turns out that when most people click on an offer link and discover there's a registration form barrier, they immediately return to the "open" part of the site. Then they poke around a bit more, and finally click back to either another offer or the original one that caught their eye.

Only then do they fill out the registration form.

As Nichols suspected, visitors are at many different stages of the sales cycle. According to the answers they give on forms:
60% are "Just Started"
18% have conducted "Extensive Research"
14% have "Seen Presentations
8% are "Decision Ready"

Plus, it turns out that doctors do surf software sites. 42% of all leads generated so far are from doctors themselves.

-> Useful links related to this article:

MisysEMR — the lead generation site
http://www.misysemr.com

My Smart Suite — The outside team Nichols hired to invent and create the site
http://www.mysmartsuite.com

LivePerson — the low-cost software you can use to track visitor paths in real-time
http://www.liveperson.com

Mysis Healthcare home site:
http://www.misyshealthcare.com