



Sample materials:

**Lead Management
Optimization Diagnostic
& Design for B2B SaaS**

Case Study: Comal Co. Lead Management Optimization Diagnostic & Design

Context:

- Comal's lead management system had significant gaps in lead conversions, with Sales consistently missing "hot leads" and not responding to all leads
- The team worked with Comal Co. to diagnose their current lead management system and design a future state system
- The effort first focused on identifying current system pain points by meeting with over a dozen stakeholders from marketing, sales, and data teams
- The team then identified opportunities for short and long-term improvement, including a demand-unit-based funnel and a machine learning scoring model

Top illustrative insights:

- Comal Co. could **unlock \$15 million in annual revenue** by implementing 5 opportunities to address pain points
- **The team identified 30+ distinct stakeholder pain points with the current state system** (e.g., max 1 lead per contact, lack of effective lead tracking, no unified lead management terminology/definitions)
- Lead Management is extremely cross functional (e.g., Sales Ops, Marketing, etc.) but **there's significant opportunity to identify a clear overall lead mgmt. owner; this has been the top blocker in the past**

Note: Names and details have been changed for client confidentiality

Lead management diagnostic and design consists of three key phases: current state diagnostic, opportunity identification, & kick-off support

Phase	Phase 1: Current-state diagnostic	Phase 2: Field execution	Phase 3: Top opportunity synthesis
Key outcomes	Frame future-state design with a rigorous diagnostic of the lead mgmt. system	Build a cross-functional future-state vision around prioritized solution areas	Deliver prioritized opptys. (quick wins + long-term), and executable roadmap
Key activities	- Lay-out core objectives and success criteria - Analyze key internal data (e.g., lead flows, user feedback, performance) - Map current-state tools, data integrations and processes across functions - Identify core users, key use cases, and critical system pain points - Synthesize findings into a current-state summary of major bottlenecks, gaps, and opportunities	- Define the future-state vision, principles, and design objectives - Develop a flow overview of how leads should be generated, qualified, scored, routed, & tracked - Create system use case overviews by function - Design lead scoring and qualification frameworks based on business goals and conversion visibility - Outline the data structure and tool requirements - Assess key risks and constraints	- Build a future-state map of tools, data, & processes to enable the lead lifecycle - Co-design detailed solutions to reach the future-state vision - Identify, assess, and prioritize key opptys. (impact, effort, timing) - Stand up “quick wins” to deliver near-term, measurable improvement - Create a transformation roadmap with milestones, owners, & resource needs

Illustrative case study follows

First RWA ran ~25+ interviews to identify & validate numerous key gaps & pain points affecting the current state lead system



Current system only allows 1 product lead per contact and completely misses additional qualified leads for that contact



Marketing and sales lack integrated lead funnel, including clear shared stages, key term definitions, owners, processes, etc.



Sales team unable to prioritize current qualified leads without significant custom research; system does not differentiate leads by propensity, est. value, etc.



Current lead evaluation is based largely on intuition as opposed to driven by a data-driven, machine-learning methodology that learns and optimizes scoring over time

Our effort captured 30+ distinct stakeholder pain points based on interviews with 15+ stakeholders across multiple teams (examples above illustrative)

Each of these 30+ distinct lead management pain points stemmed from 3 root causes

Pain point category	Illustrative example	Pot. solution
Comal is using an outdated lead management model	Current system cannot manage or qualify customer interest in 2+ products at a time due to recent offer expansion	Replace software with a technology able to manage 2+ products per contact at once
Limited funnel performance & impact visibility	It is difficult to view data or generate insights on data outside of existing dashboard	Identify key recurring data gaps and develop easily accessible dashboards
Sales does not effectively pursue net new accounts	Sales reps ignore high-potential customers	Develop a comprehensive strategy to land large net new customers

Next, the team worked with Comal Co. to define 4 key principles for their lead management system

- 1 **Establish a unified, full-funnel lead lifecycle** that tracks progression across all teams
- 2 **Implement intelligent lead assignment** based on segment, buyer profile, and team capabilities
- 3 **Drive personalized lead engagement strategies** that reflect distinct Enterprise and SMB journeys
- 4 **Sustain a cross-functional governance model** with shared accountability and KPIs

With principles in place, the team conducted a clear-eyed assessment of the current state

Principle	Overview	Pain Points (<i>Illustrative</i>)	Current State
Establish a unified, full-funnel lead lifecycle	• Comal can maintain or grow the number of leads at the top of their lead funnel with improved lead capture	• Lead capture is inconsistent; some high-value inquiries from events, partners, or organic channels are missed or logged manually	
Implement intelligent lead assignment	• Every lead efficiently & consistently routed to best sales rep based on pot. customer needs	• Potentially large clients are misrouted to generalist instead of enterprise reps	
Drive personalized lead engagement strategies	• Nurture programs are in place but largely uniform, with limited differentiation by deal size, industry, or buying stage	• ...	
Sustain cross-functional governance model	• Marketing and sales teams use separate tools, but similar metrics and definitions of lead quality & success	• ...	

To close key gaps, the team prioritized 20+ improvement opportunities – and organized them into three key categories based on time horizon

Deep Dive Follows

Opportunity	Definition	Goal	Example
Near-Term Break Fixes	Near-term fixes being deployed by the lead mgmt. stakeholders to solve critical near-term breaks & leaks	Stabilizing the lead mgmt. system and fix current bugs in the near term (~3 months)	Identify key data integrations & assign clear owners
Quick-Big Wins	Improvements that can be implemented in the next 3-12 months to better align the lead mgmt. system with our principles	Starting to make improvements to the current state lead management system	Develop clear, Comal-wide marketing-sales lead funnel
Transformative Opportunities	Changes that can be implemented in 12-36 months to meet all the lead management principles	Deliver transformative improvements to build out a new, best practice lead management system	Build out shared marketing and sales database

To further gain stakeholder alignment, we identified how the top opportunities address the stakeholders pain points

Transformative Oppts.	Key Pain Points (<i>Illustrative</i>)
Stand up future state lead management system	• Sales cannot effectively manage leads with demonstrated interest in 2+ products at the same time or during lock-outs • Leads sent to sales do not effectively synthesize & prioritize key information for sales reps (e.g., current account products, ongoing conversations)
Build out shared database for all key data	• There is no easily accessible way to compile and present key data (e.g., geographic data) consistently across teams • Inconsistent data architecture limits the teams abilities to run full lead management tracking & analysis (e.g., dashboards, monthly reports)
Develop data backed lead scoring & prioritization system	• <Example>
Proactively pursue high-potential revenue accounts	• <Example>

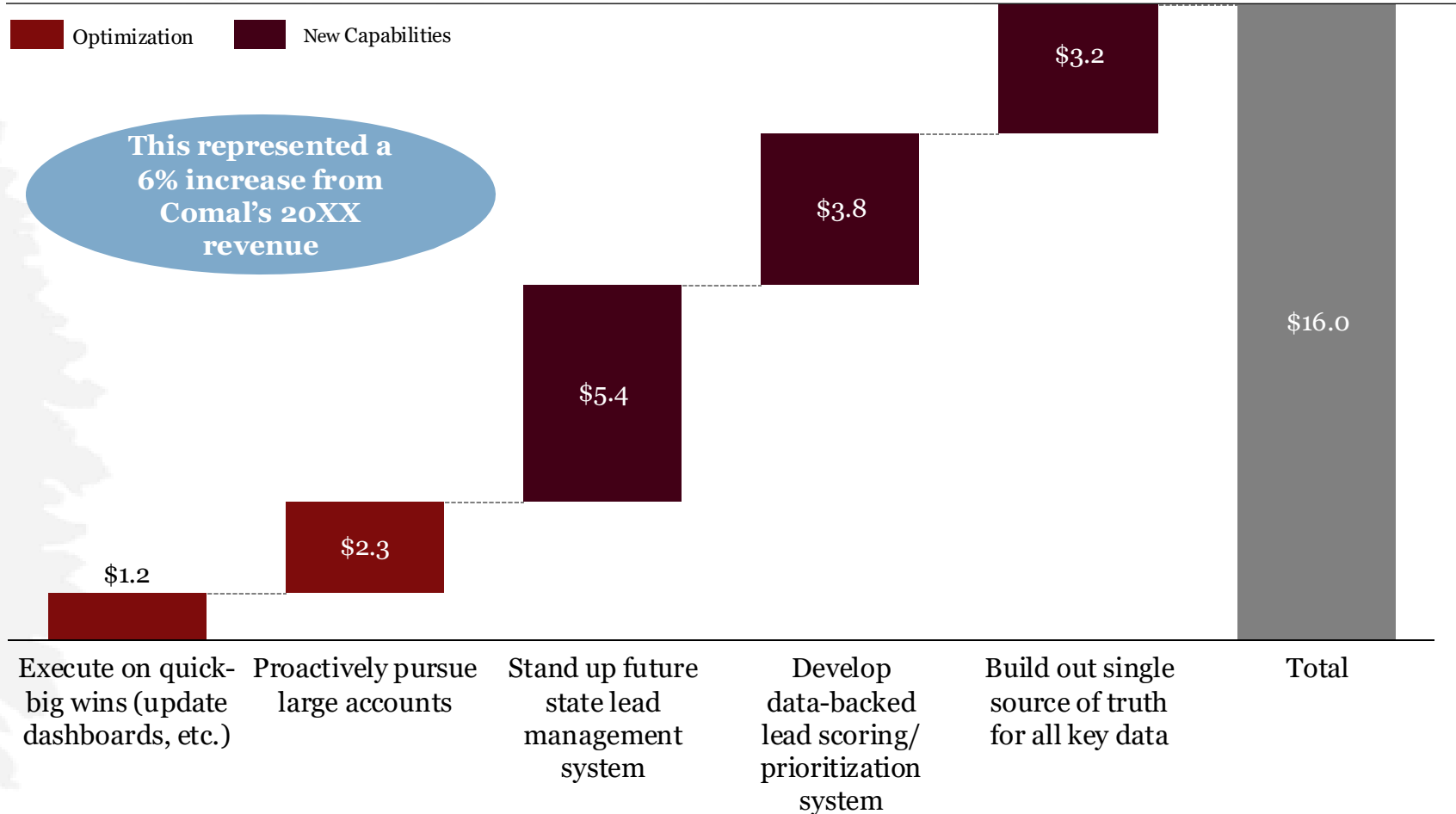
The team next assigned responsible and accountable parties for the quick big wins and transformative opportunities

■ Top priority ■ Standard priority

Quick Big Wins	Driver	Approver	Transformative Oppts.	Driver	Approver
Shared marketing-sales lead funnel	• George	• John	Stand up future state system	• Chester	• Samantha
...	• Ishaan	• Franklin	Build shared database for key data	• Abe	• Oliver
...	• Theo	• Milton		• Liz	• Robert
...	• Teddy	• Michelle	...	• Tony	• David

To help make the business case, the team conducted opportunity-sizing based on Comal's internal data

Total estimated opportunity values (\$Ms)



With key stakeholders on board, the team helped Comal determine its top resource needs for the work ahead

-  People
-  Processes
-  Technology

Next 0-6 months

-  2 add. engineering team members
-  New lead tracking software built in parallel with old software
-  ...
-  ...
-  ...

6-12 months

-  2 add. engineering team members
-  New productivity models for sales & marketing
-  ...
-  ...
-  ...

12-36 Mon

-  1 add. maintenance team member
- 

Top ~17 resource needs were laid out across the three time buckets based on timeline for executing on the improvement opportunities

The team next created governance model to support Comal as it implemented these opportunities

Top Oppts.	Overview	Key Objectives	Cadence	Lead
Opportunity Team	• Opportunity owners to conduct regular check in to ensure alignment, drive progress on key goals, surface and address key risks and blockers, etc. as helpful	• Identify and address roadblocks • Make opportunity decisions • Assess perf. towards goals • Set near-term goals • Review & update dashboards	• Bi-weekly	• Samantha
Lead Management Project Check in	• All key opportunity responsible owners / drivers to share a high-level update on their opportunities to Glen & the team to track progress & address issues as they emerge	• Ensure clear cross-functional alignment • Make adjustments to strategy • Identify resource needs • Prep for quarterly lead mgmt. meeting	• Monthly	• George / Liz
Lead Management Stakeholder Update	• Strategy meeting including all major stakeholders to review and assess performance, discuss achievements, and address challenges and roadblocks affecting lead management overall	• Create a forum to address lead mgmt. questions & concerns • Update lead management leadership on project progress & next steps • Ensure cross-functional alignment	• Quarterly	• George / Vivek

Key meetings were conducted over the next four months

Sample calendar of lead MGMT governance meetings

Opportunity Alignment
 Project Check-In
 Stakeholder Update

June 20xx

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

July 20xx

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

August 20xx

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

September 20xx

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

