



Why Are You Giving That Lead To Your Sales Team? Maybe You Shouldn't!

By Susan Saldibar

When do your marketers hand over leads to sales? As they come in? Or only after a prospective resident “raises a hand” and is ready to engage? Ideally, the answer should be the latter. And, with good lead segmentation it’s possible. Now, more than ever.

I had a recent conversation about lead segmentation with Kristin Hambleton, VP of Business Development for [Continuum CRM](#) (a Senior Housing Forum partner). We talked about how far CRMs have come since the old legacy systems, which used to just mash all the leads together, leaving sales with the task of touching every single prospect. “Back in the day you had leadership demanding that every prospect get a personal call at a specific interval in time,” Kristin recalls. But technology has made a big difference in how CRMs are able to segment leads. “Now we have the ability to clear the plate of the sales team so that they can focus only on highly engaged sales qualified leads,” Kristin says. “We can leave the rest for the marketing team to warm up.”

I asked Kristin how the CRM lead segmentation is making it possible for marketers to funnel warmer, more qualified leads to sales. Here is what she is seeing with Continuum CRM clients.

- **Ability to follow the prospect’s journey.** By segmenting your database to match where prospects are in the decision process, you can create razor sharp messaging for each step of the journey. Otherwise you are using watered down messaging that resonates with no one.

“For example, you wouldn’t send a message offering a tour to those who have already had a tour,” Kristin says. Yet she sees this happen often.

- **Prospects answer the phone.** Segmentation allows marketing to tightly qualify each lead before it is handed off to sales. When segmentation is used, warm prospects are more likely to answer your call.
- **More effective and efficient sales and marketing operations.** Segmentation helps provide a clear distinction between marketing qualified leads (MQLs) and sales qualified leads (SQLs), Kristin tells me. “When marketing concentrates its efforts on segmented campaigns to create warm MQLs for sales and sales concentrates its efforts on getting the move-in, everyone is more productive,” Kristin says. “There is no more ambiguity as to who’s doing what. No more finger pointing.”
- **Greater measurement granularity.** The crisper your segmentation is, the more accurate the measurements will be. You’ll be able to know exactly which segments are performing better and where to put your marketing dollars.
- **Ability to hyper focus effort to meet specific sales goals.** A good example Kristin gave me was targeting underperforming units. “If you have a small 1-bedroom, 1-bath, you’ll have a hard time filling it if your marketing messaging is geared to married couples,” she says. “Now, if you’re segmenting properly, you can create content directed towards only single residents.” It helps that the Continuum CRM can segment on any field. So that means you can segment by age group, demographics, psychographics, geographic locations, and more. “If you want to host an event for single individuals, you can easily pull a mailing list, create content and campaign to those people,” Kristin says.
- **Increased collaboration.** When the marketing and sales roles are clear, the relationship can become less siloed and more collaborative. Marketing can share results of segmented campaigns and get sales input on which ones are yielding the best results. And Continuum CRM has this cool HubSpot integration which means you can see what’s going on with all your leads in a dashboard format. That’s in addition to other advantages of marketing automation. “Just because you segment, doesn’t mean marketing has to do all the heavy lifting,” says Kristin. “They can execute much of this through marketing automation.”

With all this great automation and segmentation, the need for cold calling should become a thing of the past. As Kristin said, “Until a prospective resident raises their hand, they shouldn’t belong to sales. They belong to marketing.” As someone who’s been in both marketing and sales, I can get on board with that. Let’s hear it for more raised hands!

Continuum CRM has a really informative guide, “CRM for the Marketing Team” which you should check out. You can download it [here](#).

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