



Internet
Advertising
Bureau
UK

iabuk.net



The Little Book of Online Lead Generation

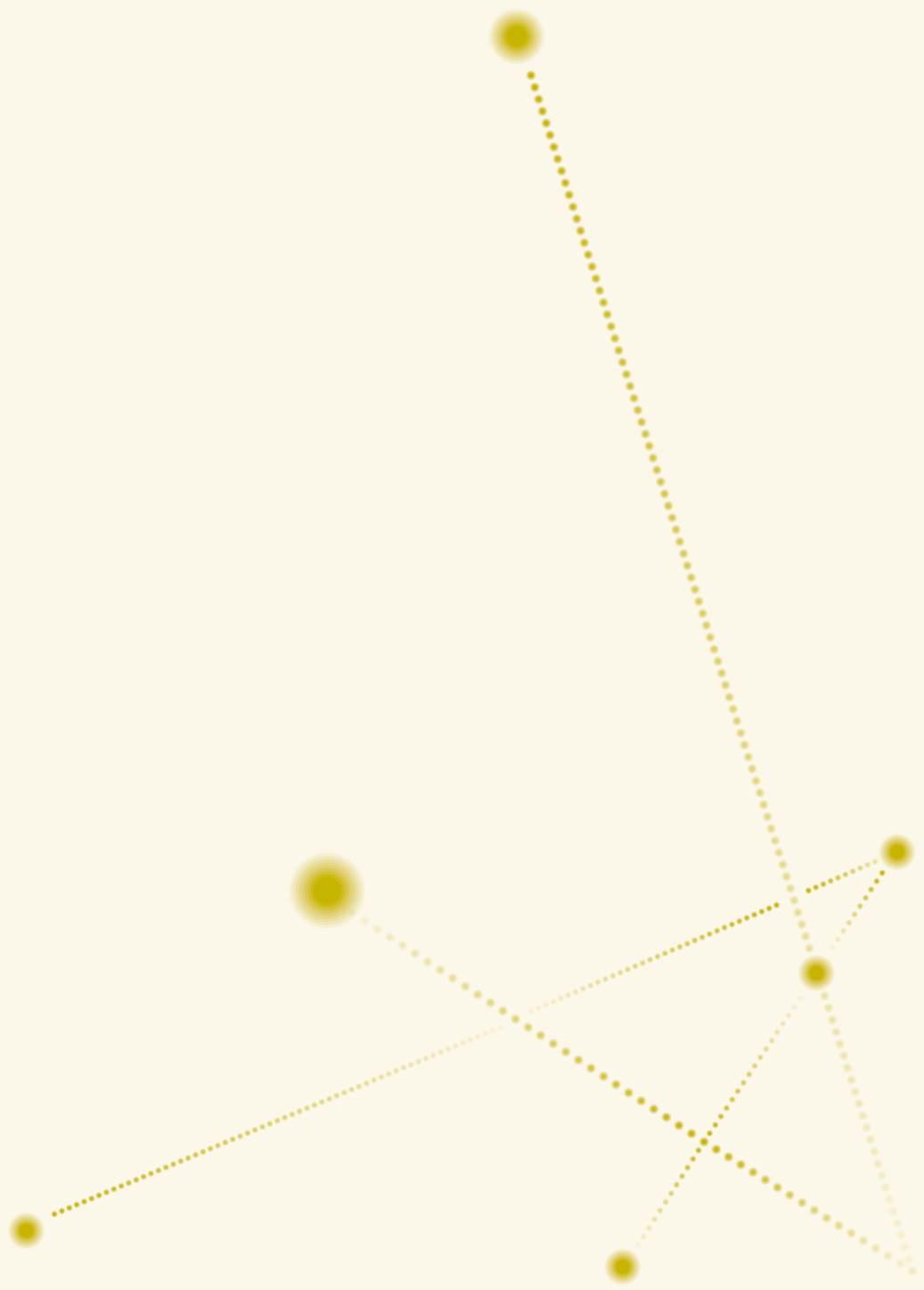


Contents

	Introduction	2
1	Definitions	6
1.1	What Is and Isn't a Lead?	8
1.2	The Value of the Lead	12
1.3	The Life Cycle of a Lead	16
2	It's All About the Data	20
2.1	Lead Transmission and Processing	22
3	Best Practice	26
3.1	Planning and Preparation	28
3.2	Different Ways to Capture Leads	30
3.3	Online Lead Generation Channels	34
3.4	Processing and Verification	38
3.5	Measurement KPIs	42
3.6	A Guide to Mobile Lead Generation	46
3.7	High Flying Leads Save Lives	50
3.8	Sky Sports TV: Case Study	52
4	Policy and Governance	54
5	Glossary	60



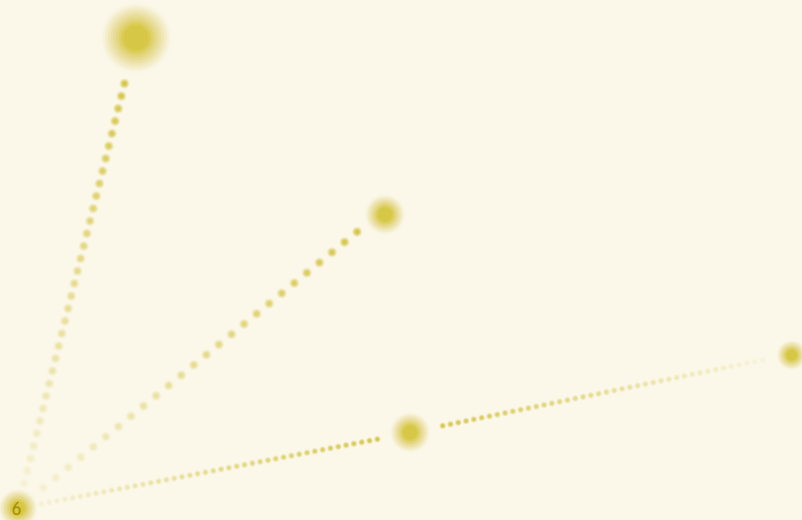
Introduction



.....

Lead generation is probably one of the oldest marketing techniques in existence and one that is enhanced by digital advertising and marketing automation methodologies.

According to the annual IAB / PwC Value of the Online Performance Marketing Industry study in 2014, online lead generation (OLG) accounted for £1 billion worth of sales via 30 million leads generated and returning an average ROI of £8 for every £1 spent.





By Clare O'Brien Senior Industry Programmes Manager, IAB

As a revenue earner for publishers, OLG is an attractive option. It is all about consumer engagement. Every lead – a piece of personal information provided by someone in exchange for something of value such as an offer, sample or voucher – has a cost per lead (CPL) value. This can range from pennies to tens of pounds dependent on how much information someone provides at the lead capture stage.

For advertisers, the acquisition of permissioned personal data has both conversion value, where a product or service is made as a direct result of the lead information generated, or as an addition to their prospecting database.

OLG is a mainstay of B2B marketing, where sales cycles tend to be long and complex and sales values are typically high. For consumer goods and services there are sectors which rely on lead generation to grow their markets and fill their sales pipelines. The automotive and finance industries are typical examples. However, even sectors such as FMCG are recognising the value of OLG as advertisers are looking to develop new kinds of direct relationships with their consumers.

With 'always-on' connected audiences, it's never been easier to establish communication channels, but there are clear rules governing the collection, use and storage of lead data which responsible practitioners need to monitor constantly in order to remain utterly transparent.

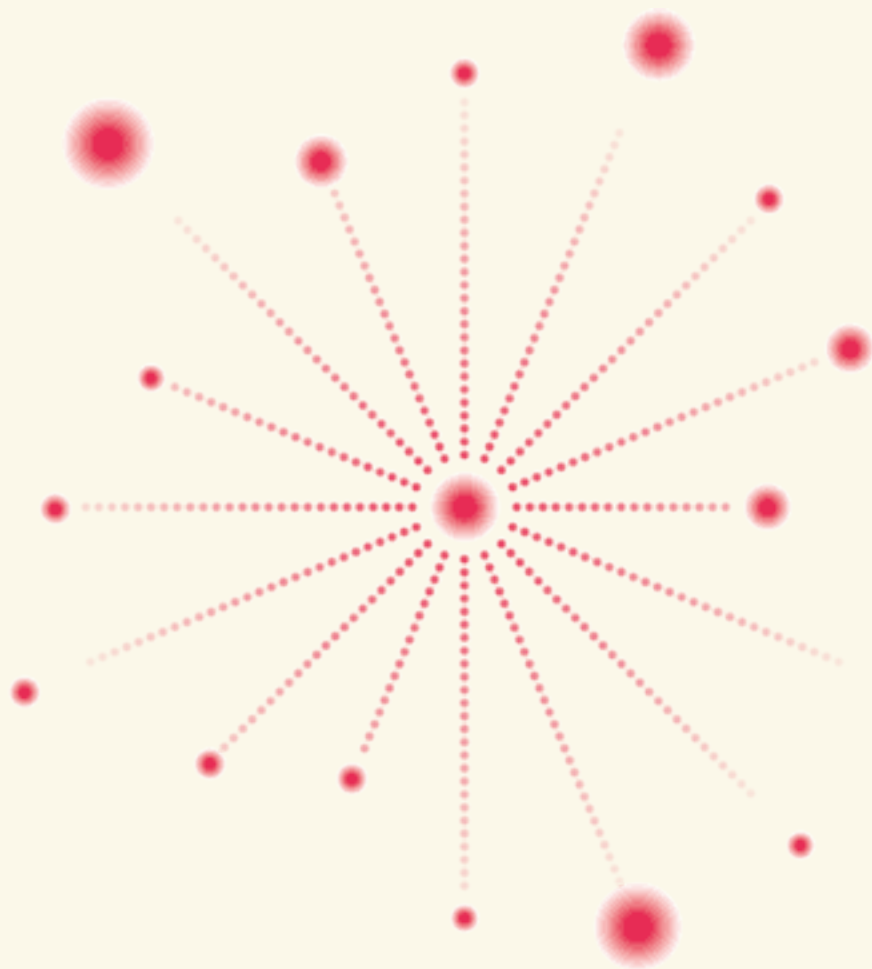
The IAB, through its Online Lead Generation Committee, has created this handbook to explain the multitude of processes and technologies in place to conceive, plan and manage OLG campaigns. Whether you are new to OLG or looking to review your existing OLG management, this handbook has been designed as your principle reference point.

On behalf of the OLG Committee and in particular the Working Group, which devised and created this publication, the IAB is pleased to present the industry's first working handbook on OLG.

1



Definitions



1.1

What Is and Isn't a Lead?

As with all marketing practice, expectation management is key, and learning what (and what not) to expect from your lead generation campaign is the best start!



Affiliate Window is a global performance marketing network built on five core beliefs; SERVICE – ETHICS – TECHNOLOGY – PERFORMANCE and INNOVATION. We exist to provide our clients with the best service and technology available in performance marketing while exceeding expectations in everything we do. For a fresh, innovative and ethical approach, Affiliate Window has all the right ingredients.

A lead is ... a prospect customer

Regardless of source, a lead is someone who has expressed an interest in your product or service. Is the 'warmth' of this measurable? Absolutely! Identifying where the lead came from will allow you to determine the level of interest.

If the lead came via a branded email, the prospect has seen your brand, read the email, clicked through to your form, continued to read on, and completed and submitted a lead.

If the lead has come from an opt-in on a co-registration page, the chances are they may not have had the chance to fully inform themselves on who you are and what you offer. These leads will require additional nurturing to be converted into a warm lead or even a sale.

A lead is ... available from many different sources

Leads can be generated by your own website, email activity, PPC, social channels and affiliate partners. It's important to treat all lead sources separately and measure them using individual KPIs and benchmarks. For example, a PPC lead generated from the search term 'BMW Test Drive London' is going to be a much warmer prospect than one coming from a third-party affiliate partner, and as such, the success of the lead should be measured separately.

Be mindful that on-going contact needs to engage and not bother a prospect. Consider what you're selling.



by Alfie Bektas

Lead Generation Team Leader, Affiliate Window

A lead is ... qualified or not qualified

A lead can be as basic as a name and email address or as comprehensive and qualified as including a postal address, telephone number and date of birth (the list goes on).

Basic leads are cheaper, but the chances of conversion will be lower and this will require further investment over time. However, this process of nurturing also has relationship development benefits.

Leads that are more qualified provide a much more profiled prospect, and usually one with multiple contact routes. In most cases, the more qualified the lead, the higher the lead price.

A lead is ... to be handled and nurtured

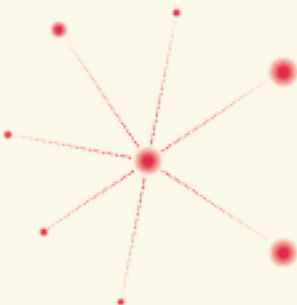
You've called a lead several times and they have not answered; do you disregard it and close it off? No!

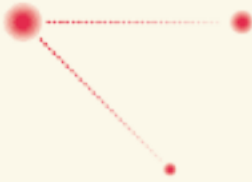
Continue to contact and engage with the individual. Formulate a lead handling process. For example, month one – email with an exclusive percentage off their first purchase; month two – send an exclusive discount offer; month three – break out the big guns and offer a voucher off their first purchase.

Be mindful that on-going contact needs to engage and not bother a prospect. Consider what you're selling.

A fashion retailer would be expected to contact prospects every season and sale period, whereas an automotive brand may reasonably be expected to make contact twice a year when registration plates change.

Your lead handling process should suit your product, your brand and your customer type. Design it carefully.





A lead is ... just the start

A lead is much like a first date – you've learnt the prospect's name, their contact details, maybe even their date of birth. Now it's time to delve deeper and find out as much as possible about your lead. DON'T ask to get married on the first date, however – that just leads to rejection.

Based on where and how the lead was generated, what offers they've engaged with and which products they've expressed interest in etc., you should shape your future contact with them to ensure they convert or, better, become a customer for life.

Your lead nurturing process provides the best opportunity for turning your leads into an engaged database. Be mindful though that this process is for the long term – invest the time in learning more about your leads and they will invest in you!

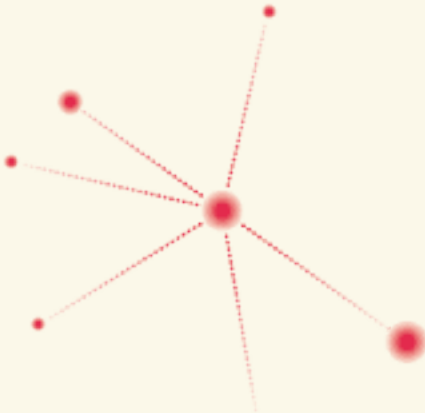
A lead is not ... a guaranteed conversion

All too often we hear, 'these leads came in yesterday and none of them have converted'. Maintaining that all leads are prospect customers, a thorough lead handling and nurturing process is absolutely vital to get the best out of your leads!

Also, don't forget your product's conversion time frame. For example, someone interested in joining a gym may convert in a number of days, whereas someone looking to study at a university may take months to consider their decision.

If you're running a 'brochure request' piece, ensure that the first thing the prospect receives from you is a brochure.

Contacting someone in a way they did not request can cause them to lose trust in your brand and they are likely to feel hassled and not helped.



A lead is not ... to be ignored

If a customer were to walk into your store, or call you on the phone, would you keep them waiting? No, of course not, and your online leads should be treated the same.

An article published by Ken Krogue¹, co-founder of insidesales.com, showed that on average, most companies make their first contact with a lead 46 hours after the lead was generated – with only 27% of total leads actually being contacted at all.

In most cases, the quicker the initial contact, the more likely you'll make an impact and the more likely you will convert. The same study showed that leads contacted within the first 5 minutes were 21 times more likely to be qualified.

A lead is not ... to be misled

Have you ever filled in a form for a free online quote then received a call moments later that you weren't expecting? Yes? Then remember that feeling!

The definition of a lead is 'a customer or prospect who has given their express consent to be contacted about a product or service', but the method of contact and how you respond is key.

If you're running a 'brochure request' piece, ensure that the first thing the prospect receives from you is a brochure.

Contacting someone in a way they did not request can cause them to lose trust in your brand and they are likely to feel hassled and not helped.



1. <http://www.forbes.com/sites/kenkrogue/2012/07/12/the-black-hole-that-executives-dont-know-about/>

1.2

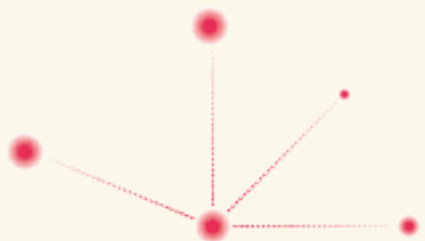
The Value of the Lead

.....

Marketers looking to develop successful lead generation campaigns often pose questions centred around the worth and value of a lead. How much will the lead cost to acquire? I have leads to sell, but at what price? What is a lead worth to my business? Why are some leads more expensive than others? The value of a lead is said to be intrinsically linked to its overall quality, but in a competitive market place it is arguably the buyer of the lead who determines its price. Let's take a look at value from each side of the equation...



CAKE provides a SaaS-based solution to track, attribute and optimise the performance of digital marketing spend, in real time. Bringing clarity to multi-channel marketing campaigns, CAKE empowers advertisers, publishers and networks with the insight to make intelligent marketing decisions.



by Paul Wright, Managing Director Europe, CAKE

A difference in value

At the point of exchange, a **lead seller** will have invested time, revenue and resources in both capturing and validating leads in order to ensure their potential worth has been secured and optimised. After all, a lead that has not been validated and proven to be legitimate will hold little market value. Sellers know that taking more measures to verify a lead ultimately leads to an increase in value. Coupled with verification, the more targeted the lead is to a specific vertical, sector or demographic, the more desirable this will be to potential buyers looking to acquire such leads to meet their own business goals.

Lead buyers will measure value on what revenue potential a lead holds for their business. Accordingly, the better a business knows their target customer, or indeed what an early stage customer looks like, the more effectively they can look to source leads that match that profile. Buyers may be willing to pay a premium to sellers who are able to deliver against exact profiles, but less so where the probability of converting that lead into an acquired customer declines.

It's often said that 'value lies in the eyes of the beholder', and in many ways this rings true for lead generation. Business, however, can only take place when the goals and values of the buyer and seller are aligned. There needs to be a match between both parties before agreeing on a value. A high quality online dating lead, for example, holds little to no value for a mortgage provider. Similarly, an email address alone holds little value in comparison to full disclosure of personal details and an expression of interest towards a particular product.



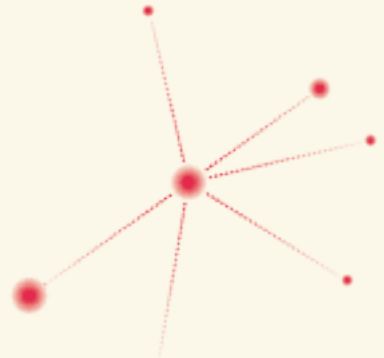


Factors affecting lead value

Once armed with an understanding of value, it's important to consider what factors can manipulate it.

- **Verification:** Covered in detail elsewhere in this handbook, suffice to say that increased verification results in a higher market value.
- **Age:** The age of a lead, from form submission to lead delivery, is critical in preserving value. A person registering interest may well 'go cold' if the buyer is unable to follow up on their interests immediately.
- **Response times:** In a real-time situation, it's critical that lead buyers are able to respond to sellers in milliseconds. When multiple buyers are auctioning for the same lead, the fastest response may well get the lead over a buyer willing to purchase at a higher price but reacting slower.

- **Enhancement:** It's possible to enhance a lead by adding further information to increase value and enable additional marketing possibilities. A call centre, for example, may be used to gain additional data points after speaking to the person, which in turn enriches the lead either for reselling or better targeting.
- **Exclusivity:** Leads sold exclusively by a seller to a single buyer are deemed to be the most valuable. In the event of no exclusive buyer (or one willing to pay the premium), a lead seller may choose to sell the lead to multiple buyers at a lower value.



-
- Intent: Understanding a person's intent at the point of form completion can be difficult to measure, however, the effect on value is clear. A person incentivised by other means to complete a form will not have the same value as somebody motivated only by their desire to be contacted, purchase or seek further information.
 - Duplication: Duplication occurs naturally in lead generation (as with other media channels), but that doesn't necessarily mean a reduction in value to your campaign. Investing in the ability to cross-reference your own database in real time with partial lead data sent by the seller (such as email address) will allow you to respond and reject immediately, and in doing so, to recognise more value from your budget. This type of functionality is often referred to as ping-post.

Automation and engagement

If the thought of managing all the variables above sounds daunting, don't worry – help is at hand. Leading end-to-end lead generation technologies are able to process the above variables, deal with the most complex campaign setups and ensure that value is not only retained, but also maximised according to your own business logic. However, that's not to say that this is the end of the story. Once a lead has been acquired, it's important to recognise that the value chain does not end, but rather continues and will fluctuate over time according to how engaged (or not) the individual is with your company. Lead scoring and marketing automation technologies can be used to enable you to track customer engagement from lead acquisition through to eventual conversion.



1.3

The Life Cycle of a Lead

.....

Sourcing to Success in 9 Easy Steps

A lead generation campaign consists of a fairly linear path, starting with sourcing leads and ending, hopefully, with a successful sale. Along this path, there are many opportunities to enhance the quality of good leads, weed out tyre-kickers, minimise wastage and reduce costs. The key is to make small gains at each stage of a lead's life cycle to significantly increase the overall campaign's ROI. There are nine stages of a lead's life-cycle.



Cohort's goal is to be the benchmark in Lead Generation, Smart Data and Consent Marketing. Using proprietary technology, combined with old fashioned service, Cohort helps businesses connect with consenting consumers in an innovative, privacy compliant manner.

Step 1: Identify your audience

The **audience** you target is your first decision. Age, gender and location are the cornerstones of audience targeting. Some sources offer additional targeting options, but these should only be introduced once a baseline has been achieved, so as not to limit lead volume unnecessarily.

The other consideration is the environment where the offer or ad will be displayed. Typically these include: email, promotional sites, vertical content sites and comparison sites. Each environment has its own specific characteristics and will generate different types of leads at different costs per lead.





by Jon Ostler, Managing Director, Cohort Global

Step 2: Set your offer - Quantity vs quality

The **offer** or ad is an area where there's often a balance to strike between volume and lead conversion rate. At extremes, this ranges from running a competition to deliver a high volume of leads, but which will have a low conversion rate to sale, to running a mini-survey to qualify leads, and this delivers a high conversion rate to sale but a low number of leads.

Generally, the higher the opt-in rate, the less you will need to pay per lead. However, the conversion rate will drop if the incentive is too great or unrelated to the product being promoted. A good middle ground is to offer a discount, bonus gift or sales promotion which is only awarded once a purchase has taken place.

Step 3: Capture

Leads are captured using various methods, including **co-registration**, **branded forms** or **generic quote request forms** (see [glossary page 60](#)). Forms can be pre-filled to aid people or blank to ensure fresh details are entered. Form validation ensures people are prompted to complete all the fields correctly. Other common features may include a postal address look-up function, and a security CAPTCHA system that verifies a human and not a BOT is filling in the form.

Step 4: Process - Validation

Once a lead has been captured, the first task is to ensure it meets any campaign constraints. Typical examples are:

- Demographics such as age (between 18 and 50, for instance)
- Correctly formatted data, such as dates, phone numbers, postal addresses and email addresses
- Filter out invalid names and swear words – it does happen!

Typically, leads are de-duped at this point, so only new leads are accepted to be paid for.

Step 5: Process - Verification

Verification is when lead data is actively checked against a third-party service or database. The most common verifications include checking if an email box exists, if a mobile number is registered as active and if a postal address is recognised by the Royal Mail's PAF database. There are many other verification and scoring options that can be utilised depending on the requirements of the campaign. For example, fraud detection systems can be added into the mix and are recommended if networks are being used to generate traffic and leads on a cost per lead (CPL) basis.

Step 6: Process - Lead enrichment

Lead **enrichment** is achieved by appending data to leads from third-party sources. These should be considered especially for B2B and high value sales. Typical enrichments can include geo-demographic and credit worthiness scoring, or perhaps appending data from matching social media profiles.

Step 7: Automation

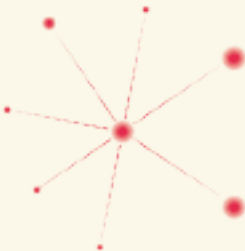
Automation via a CRM triggers a series of direct communications, and is strongly recommended for most lead generation campaigns. As a minimum, this should consist of an email auto-responder sent to someone thanking them for their interest and explaining what will happen next. As well as immediate engagement, it also allows for additional information and calls to action at this early stage. Automation can be expanded into a full lead nurturing journey, utilising multiple channels.

Step 8: Qualification and routing

In some circumstances, post-capture **qualification** and **routing** may be appropriate, where leads are reconfirmed via marketing automation or by an initial out-bound telemarketing function before being directed to the appropriate internal resource for follow-up and conversion. The importance of qualifying out low value leads should not be underestimated because it allows resource and communications to be focused on the most qualified and engaged consumers.

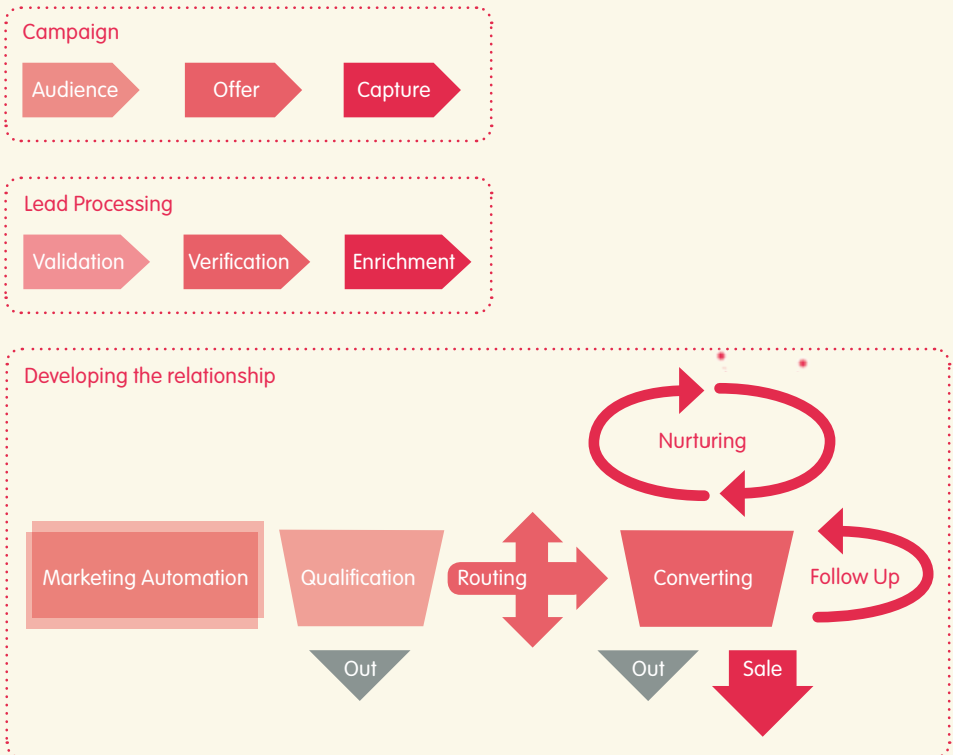
Step 9: Conversion

The ultimate goal of any lead generation program is to **convert** a lead into a sale and a new customer. However, in reality, the majority of leads will not convert into a short-term sale and should be flagged for an agreed **follow-up** – normally a call-back, or passed into a lead nurturing program such as a newsletter database. If a lead has been qualified out or has opted out then the lead should be retired and removed, added to a suppression file, or archived, depending on the business rules of the organisation.



Final thoughts

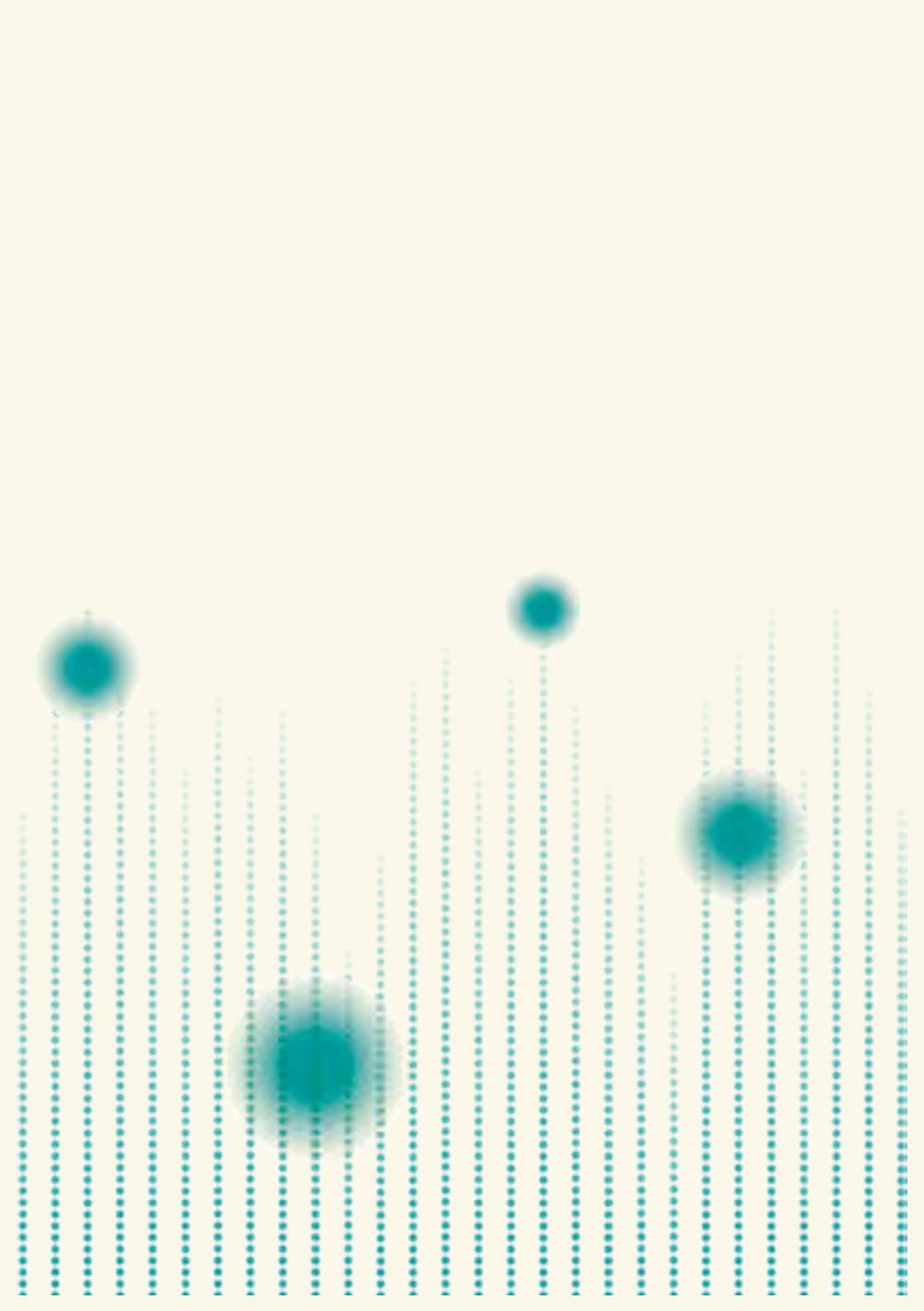
The life of a lead is often short, but by actively refining and improving each stage of its life, dramatic improvements can be made to a program's return on investment, and this can be the difference between success and failure.



2



It's All About the Data



2.1

Lead Transmission and Processing

Abstract

Lead generation and its associated management is a complex process that could involve multiple parties, all playing a specific function. Each party must participate in a complex negotiation of security protocols, data transfer methodologies and business processes to ensure the most valuable asset throughout this concert of activities is protected – the lead information.

Lead information may need to be validated, enriched with additional information, routed to multiple parties depending on complex business processes, or persisted in a secure manner, all while maximising overall performance of the lead management system.

Succinctly, secure communication between the various participants (e.g. HTTPS using the 'POST' method) is paramount, with speed and efficiency of communication a close second. Securely storing any lead information can be achieved via a combination of encrypting specific lead elements as well as securing the persistence layer in its entirety.

It is the responsibility of the lead management system to ensure best practices are put forward, and that all participating parties adhere to those best practices insofar as is feasible.

Introduction

Online lead generation requires data validation, enrichment, transmission and persistence strategies benchmarked against industry standards and regulatory requirements. All parties involved in the lead management process have a responsibility to the lead to ensure that their information is transmitted, processed and persisted securely and expediently.

Lead information should be transmitted securely at all times to all involved parties. Where possible, appropriate security considerations should be in place between all participants to minimise the risk of lead information being made visible to unknown third parties.

by Chirag Mehta, Vice President Customer Success, CAKE

Modern lead management systems will employ a variety of secondary protocols to validate and enrich the lead data. Interaction with these validation and enrichment systems should follow a 'need-to-know' process whereby only the relevant fields of information are provided.

Lead information must be securely persisted, with sensitive information encrypted within the data store itself. Data persistence standards will vary from participant to participant; standards and practices must be communicated to, or be able to be referenced by, all parties as regulatory requirement and applicable laws require.

The objective is to implement a business process that enables sending lead information from one system to another securely and efficiently, and receiving confirmation that the lead information has been accepted.



Transmission

General best practices between all elements of the lead generation process require securely transmitting the lead information. This transmission should be done expediently, with all validation and enrichment protocols occurring in as close to 'real time' as possible. Real time processing of leads benefits all parties involved by allowing for faster reconciliation and simplified data persistence of the lead information.

The de facto standard method of transmitting leads between involved parties is 'HTTPS' (HTTP over SSL). Individual lead information is sent to a known location and in a secure fashion; the HTTP POST method is significantly preferred over HTTP GET, though both provide adequate security. When passed via HTTP GET, embedded or linked third-party content on the source will receive the full URL (including sensitive lead information) via the referrer header. When passed via HTTP POST, lead information is secured in the POST body, ensuring only the intended recipient has access to the data.

There is a strong preference to send lead information individually, as opposed to sending information in batch. Individual transmission reduces the risk of data loss, provides per-lead receipt and response validation, and provides immediate feedback should a different business process need to be followed based on other telemetry.

Processing

Lead management systems will route specific leads based on business-rules-specific criteria for additional validation or enrichment. For example, leads that originate from a specific source could follow an additional layer of validation before being sent to its final destination, in the event a specific source has a lower than average signal-to-noise ratio.

In addition to following best practices around transmission considerations, only relevant or necessary lead information should be sent to third-party validation and enrichment systems, to ensure the sanctity of the lead. For example, address validation oftentimes does not require name or other personally identifiable information to be sent to the address validation service, and thus no other information should be sent.



Persistence considerations

Different parts of the lead management process will have different persistence requirements. Volatile lead information may be persisted only in memory (i.e. not easily retrievable via external systems), while stable lead information will be persisted in a meaningful fashion.

In general, the closer to the final state a lead is in vis-à-vis the lead management process, the more stringent the security considerations around persistence need to be.

The data being stored determines the level of security necessary through the persistence layer. Personally identifiable information should be securely stored, with financially relevant data possibly being remitted under the Financial Services Authority.

Similar to how physical access to data must be restricted at all times, so should programmatic access. Data access must be logged, auditable, and repudiated at regular intervals. The data itself must be stored in encrypted fashion, with particularly sensitive data being further encrypted to prevent direct, unauthorised access.

For example, a lead information database must be encrypted as a whole, with the individual fields being encrypted as well (if it were to contain tax ID information), so as to prevent a simple database query from returning those values.

It is widely accepted that data persistence and its associated regulatory compliance is the responsibility of the data owner. As such, great care must be taken to ensure the sanctity and the security of the data.

3



Best Practice



3.1

Planning and Preparation

The time invested in planning and preparing a lead generation campaign is critical to its success. This means planning the entire process from lead capture through to lead handling and measurement.

The benefits are:

- Avoiding most potential problems
- Optimising results
- Efficient marketing spend
- Most positive communications with prospects
- Well managed stakeholder expectations

The main areas for consideration are:

Lead type

- What type of contact is appropriate for both your audience and business?
- Can you facilitate appropriately? Is there a limit to, or capacity for, facilitation?
- Can you track it?
- What is the follow-up format?
- Does it allow for cross/up-selling? Should it?
- Is it long or short term ROI focused?
- How can it be nurtured towards conversion over time?

Data Capture Form

- What's the minimum amount of information needed to maximise the value from the lead? Does this fit above the fold?
- Are the instructions and messaging clear?
- Is it inclusive of privacy policy and terms and conditions?
- Is all copy and imagery relevant and inviting?
- Is the form device responsive?

Throughput:

lead submission to delivery

- Where does the lead need to be delivered to?
- What's the delivery method? Is this in line with the facilitation time frame required?
- Can the lead data be correctly interpreted by the facilitators?
- Will the lead be verified or need criteria to adhere to? How will this be implemented?
- How/will you de-dupe? If so, how will this fit into the overall process and impact lead sources?
- Do you have transparency on what does and doesn't pass as a lead?
- Is throughput as a whole as seamless as it can be?

by Sophie Metcalfe, Business Performance Manager – Commercial & Lead Generation, Affiliate Window

Lead handling

- What are the potential customer touch points?
- How quickly is the lead dealt with?
- Are all stakeholders fully briefed on the campaign (including call centres and CRM team)?
- Is there a limit to the lead facilitation capabilities? E.g. call centre capacity, free sample limit
- Are prospects' expectations managed throughout their journeys? For instance, do the confirmation page messaging and auto-responders confirm next steps and indicate time frames for contact?
- Is there message continuity?

Reporting:

- Can you feedback on a per-lead level?
- Are the data fields sufficient to calculate your performance metrics?
- What information can be returned via customer touch points to aid conversion?
- Can you differentiate performance across products/services?
- Can you differentiate the touch points by device?
- Can it be updated regularly?
- Can it be automated – (perhaps when the campaign is a little more mature)?
- Can the data be used to build a more in-depth lead landscape and insight into longer term customer behaviour, e.g. lead time between capture and conversion, repeat purchase frequency, average contract length etc.?

Performance metrics

- Which target metrics are important to your business? E.g. cost per action/cost of sale. Are these realistic and relevant for the activity?
- Over what time period will they be measured (short or long term ROI dependent on lead type)?
- What optimisations can be made to affect each of the metrics?

Testing

End-to-end testing and troubleshooting should be the final, but most important, step prior to the campaign going live. This has to include feedback on the customer journey, continuity, lead facilitation, speed and quality, and ensuring the correct reporting metrics are being captured. Once all this is ticked-off, your campaign is ready to go live.



3.2

Different Ways to Capture Leads

.....

The lead generation landscape can be difficult to navigate, particularly when it comes to assessing lead capture methods. There are a plethora of methods, each with its own distinct characteristic and related best practice. It's essential to understand these capture methods and the best practice for each.

Lead form marketing is a method of lead capture designed to generate high quality leads, and hence it attracts a corresponding higher cost per lead. The lead form is hosted within a landing page designed by the advertiser agency, with the single purpose of capturing leads. This landing page is promoted by publishers on a cost per lead (CPL) basis via email, display ads and social channels owned or controlled by the publisher.



By Jon Ostler Managing Director, Cohort Global

A consumer will respond to an email or social media invitation, or click on a display ad taking them to the landing page. When people complete the form, their details will be passed to the advertiser for action.

Another execution of lead form marketing is a vertical specialist, where a publisher operates a site in a specific vertical, e.g. automotive, finance or education. The publisher presents people with lead forms at various stages of their journey through the site. With vertical sites, it's important to understand if people will be opting into an exclusive branded offer or if they will be opting to receive calls from a number of competing brands.

Lead forms normally generate the highest quality leads in terms of conversion rates, but volume can be constrained by the willingness of publishers to run the campaign if the conversion rate or cost per lead is not high enough to justify space on their email or display inventory. It's therefore important to provide email and display creative that will grab the consumer's attention and interest, and then follow through with a landing page that instills trust and persuades the consumer to complete the lead form.

Landing page design is an art and a science, and there are a number of proven page elements that will increase conversion rate. Make sure when designing or reviewing a landing page that you have ticked off each of the key page elements noted in the Top Tips:

Lead form – Top technical tips

- Use form validation to help people complete the form correctly
- Use data verification and fraud detection systems
- Start with a small test and adjust the cost per lead offered based on results
- Test long and short form versions and measure the impact on total sales
- A/B split email and display creative

Lead form – Top persuasion tips

- Clearly present your value proposition
- List key selling points
- Try and include a limited time offer
- Add trust elements, including testimonials, accreditations and security icons
- Include FAQs to deal with common counter objections
- Be transparent in explaining what you will and will not do with their information

Co-registration is a method of lead capture designed to generate a high volume of low cost leads at the early stage of a consumer's consideration process. The mechanism is relatively simple, but designing, deploying and managing a campaign can be more complex.

With co-registration, consumers will have registered on a site to buy a product, access information or enter a competition. The site will therefore hold key contact and demographic information about the consumer.

Once the user has registered, the site will display one or more co-registration offers, for example: 'Would you like to receive a call from Brand X to discuss how you can save money on your utility bills? [Yes/No]'. Offer questions are normally accompanied by a logo or banner and sometimes a short summary about the advertiser.

As the site already has the consumer's contact details collected during site registration, it simply passes these on to the advertiser as a lead if the consumer opts in to the offer question by ticking 'Yes'. Co-registration offers a low barrier opt-in from a consumer's perspective and can therefore be used to generate a high volume of low cost leads. However, the consumer is normally at the early stages of their consideration process and so this approach to lead capture requires a sophisticated email lead nurturing program or an outbound call centre to work effectively. Consequently, co-registration is a popular capture mechanism with insurance, charity, travel, retail and gaming advertisers.

needs to use the most appropriate capture method while ensuring that best practice is followed.

Once the user has registered, the site will display one or more co-registration offers, for example: 'Would you like to receive a call from Brand X to discuss how you can save money on your utility bills? [Yes/No]'. Offer questions are normally accompanied by a logo or banner and sometimes a short summary about the advertiser.

As the site already has the consumer's contact details collected during site registration, it simply passes these on to the advertiser as a lead if the consumer opts in to the offer question by ticking 'Yes'. Co-registration offers a low barrier opt-in from a consumer's perspective and can therefore be used to generate a high volume of low cost leads. However, the consumer is normally at the early stages of their consideration process and so this approach to lead capture requires a sophisticated email lead nurturing program or an outbound call centre to work effectively. Consequently, co-registration is a popular capture mechanism with insurance, charity, travel, retail and gaming advertisers.

Co-registration – Top tips

- Use a specialist lead platform to process leads
- Keep the offer question short and sweet
- Test different wording
- Test different imagery
- Use a discount or bonus gift to boost volume
- Use qualifying questions to boost conversion rates
- Use age as an initial filter to boost conversion rates
- Use an auto responder and track engagement
- Make sure you can track conversions by source

With a range of different capture methods in play in the lead generation marketplace, it is important to understand that not all leads are created equal. A high performing lead generation campaign therefore needs to use the most appropriate capture method while ensuring that best practice is followed.

3.3

Online Lead Generation Channels – The Pros and Cons of Each

In 2014, 38 million adults (76%) in Great Britain accessed the internet every day¹. Tapping just a fraction of this vast and dynamic market could set your brand and business up for continuous profit.

According to a recent US survey ‘The 2015 State of Digital Marketing’, over 600 marketing professionals participated and recognised ‘driving sales’ as a top priority, however a third felt that this objective was their biggest challenge². This underlines the importance of generating leads for new business.

There are seven reliable online lead generation channels. Let’s look at these channels together with their respective pros and cons.



by Rishi Kapoor

Head of Consumer Advertising Sales, Monster UK/IE



Online Lead Generation Channels

1. Email marketing

Email is an integral touch point along the customer journey for the majority of marketers. A 2015 State of Marketing study by Salesforce suggests 73% agree that email marketing is core to their business³.

Pros:

- Economical
- Generates high response rates
- Targeted reach
- ROI tracking and reporting capability

Cons:

- Spam is the biggest threat
- Time sensitive and stressful process

2. Social media

Social media marketing has emerged as a channel that many businesses take advantage of. A recent study suggests that 87% of marketers feel this is their most commonly used B2C marketing channel⁴. Most marketers feel that B2C projects can get good leads from Facebook but that it doesn't work that well for B2B projects since the users are in the 'consumer' mode. However, if you want to generate B2B leads, LinkedIn is a gold mine.

It is believed that organisations who blog six to eight times per month can nearly double their volume of leads.

Pros:

- Compelling and relevant content attracts attention
- Low advertising costs
- Social content can improve search traffic
- Generates instant leads
- Increased loyalty drive sales

Cons:

- Needs resources and offers less control
- Difficult to quantify the return on investment

1 Office for National Statistics

2 2015 State of Digital Marketing Survey

3 Salesforce 2015 State of Marketing Study

4 2015 State of Digital Marketing Survey

3. PPC – Paid search

Paid search marketing is one of the best ways to help a business get consistent traffic from relevant search results and other websites. In the UK, Google is by far the leading search engine, with the biggest market share (88.87%: 2014)⁵. Let's look at Google AdWords' key advantages and disadvantages.

Pros:

- Quality and conversion of leads is very high
- Quick turnaround of leads
- Tracking and reporting makes ROI easily calculable

Cons:

- The cost per lead can be very high
- Difficult to target at the click level
- Constant optimisation of landing pages is required

4. SEO – Organic search

Organic search plays a major role in securing a good online presence and generates high quality prospects who are using search engines to look for specific products, services, brands and businesses.

Pros:

- Lowest cost per lead
- Engages serious buyers
- Delivers a continuous flow of targeted leads

Cons:

- Takes a long time to achieve a good return on investment
- No guaranteed results (especially with first page ranking)
- Lead quantity can be low and cannot be controlled
- Higher advertising costs

5. Display advertising


The general consensus among digital marketers is that display advertising is great for branding but not for lead generation or direct response marketing. However, it can be a good channel if you have enough marketing budget and want to supplement your lead generation activity from other channels. Widgets, contextual text links, interstitials (data capture forms) and iframe banners are mainly used to generate leads.es.

Pros:

- Presence on high traffic websites
- Potential to work on cost per lead basis with publishers/networks
- Free branding

Cons:

- Generally low click to conversion rate
- Low volume
- Higher advertising costs



6. Comparison sites / Quote engines

These are aggregators of content and brokers of products and services. Typically this is where someone exchanges their personal details for content of value, for example a mortgage calculator, and this may include a no-obligation follow-up consultation with a relevant company.

Pros:

- These sites will invest in their own marketing budgets
- Good source for generating bulk non-premium leads

Cons:

- Some companies sell the same lead to other organisations
- Quality of the lead can be low

7. Competition sites / prizes / offers

Finally, probably the lowest and cheapest form of online lead generation: capturing data from competition entrants and offer based sites. These sites spring up all over the place and attract customers who share their details in exchange for something.

Pros:

- Work well for low ticket products or services
- High lead volumes are possible

Cons:

- Advertiser would have to arrange to pay for the prize or offer
- Incentives dilute the quality of the lead

Conclusion

Generating leads online has the power to transform your marketing. The list of online lead generation channels is rather long, and the paid-for routes can definitely present some challenges. That being said, if the above-mentioned channels are used effectively, it will reduce your risk and you will be able to drive a continuous flow of highly targeted traffic that converts into valuable leads

3.4

Processing and Verification

Over the past few years the lead generation industry has rapidly shifted towards lead value over lead volume as a priority. In doing so, there is an ever-increasing necessity to develop and implement tighter controls around processing and verification. Before we dive into the techniques and widely available technologies, let's first establish what's meant by the 'processing' and 'verification' of leads.

by Paul Wright, Managing Director Europe, CAKE

Processing vs verification

Put simply, the **processing** of a lead can be described as the mechanics and series of actions through which a lead is systematically passed from a **lead seller** to a **lead buyer**. At its most simple this may be a publisher selling captured consumer data to an advertiser. Underpinning the process are both security and transparency considerations and measures.

Verification on the other hand is perhaps the most important step in the entire lead generation process. Why? Because without verification there is arguably no value to the lead and the entire ecosystem falls down. It's at the verification stage that we're looking to validate that the information contained in the lead is legitimate, intentional and matches desired business goals.

So how do we validate?

Verification can be split into **a)** internal checks and **b)** third-party tools. Internal verification checks may take place in a number of ways but, most importantly, can be achieved with little effort and negligible costs, and can be processed quickly. Avoiding bad data by subjecting leads to a primary layer of verification is the primary goal at hand. Dealing with typos and malformed data submitted while completing submission forms are great examples of this. Someone may misspell a well-known email provider such as gmail.com as gmial.com, at which point it makes sense to alert them and indicate where on the form the error has occurred, requesting it be corrected (providing corrective suggestions where possible).



Other quick wins may include measuring the time taken to complete and submit a form. Did the person complete the form in a time that's not humanly possible or in a manner that varies wildly to what is considered an acceptable norm? What about the phone number? Does it correspond to known countries/regions and does it have the correct number of digits? Additional suggestions include cross-referencing IP address against the country/region submitted by the user. Finally, you may also want to check for profanity or rude words. Do exercise caution here as false positives may occur. For example, automatically rejecting leads that contain the word 'sex' won't please people who live in Middlesex or Sussex! Collectively, these 'on site' verification checks can all make for improved accuracy and turn a potentially worthless lead into a valuable lead.

Once primed, third-party tools and solutions can be used to further validate the lead, typically at an additional cost. Many of these third parties cross-reference lead submission data with their own exhaustive databases, or provide real-time lookups with end service providers such as email, financial or telecoms, to name but a few.

In the latter, it's typical for a phone number to be validated against its live/connection status and carrier history. A street name field may be validated against a postcode field to further check consistency and the connection between data fields. Email addresses may appear to have legitimate format; it may be associated with a well-known email provider, but does the myname@provider.com account actually exist with that provider and was it the actual account owner of that email address that submitted the lead? Verification can answer these questions and install both trust and value within the channel.





Processing and delivery

Processing a validated lead is largely dictated by the delivery methodology used; batch, http and email are most common. Advances in technology and improved best practice guides have led to a decline in methods where processing and lead transfer are subject to security issues and prone to human errors. For example, batches saved as csv files are often handled manually and transferred in non real time, via email or USB memory sticks with obvious security risks.

It's now considered best practice to post leads in real time over a secure connection and using the http POST method is preferred. In this case, once validated, each lead is passed from a seller to a matched buyer for an agreed price. Crucially, both parties acknowledge the event has taken place in real time. A unique lead ID provided by the seller is logged and an agreed response token from the buyer received. This 'digital hand shake' allows the buyer to send a confirmation message to the seller of their intent to purchase and for the seller to deliver the specific lead information at the agreed cost.

Broadly speaking, the more steps taken to verify the better. Coupled with secure processing in a swift and verified manner, this increases the overall value and effectiveness of your lead generation efforts.



3.5

Measurement KPIs

To measure campaign performance effectively, marketers need to understand their businesses' KPI benchmarks relative to type of campaign and potential ROI timeframe.

Clearly these are individual to every business, reflecting sector, product or service, and, of course, marketing requirements. For those responsible for establishing campaigns, it's important to be clear about managing expectations internally: for example, what success looks like for specific campaigns. Plus, one must always consider that leads require nurturing and will typically be captured at earlier stages of a customer's buying decision journey.

There are many factors that influence a campaign's performance, even where competitors are selling the same product or service, and recognising these will enable greater success optimisation.

For example:

- Call centre effectiveness/conversion rates
- Call handling volume capabilities
- Speed of facilitating the response the lead requires relevant to the campaign type (how quickly they were called back, how soon the brochure was dispatched etc.)
- Ability to follow up on leads in a relevant fashion
- Use of a promotion or sale as a hook
- Price competitiveness
- Effectiveness of design/copy with campaigns utilising email/brochure/samples
- Database set-up and ability to interrogate performance per lead source & optimise accordingly



by Michelle O’Sullivan, Commercial & Lead Generation Director, Affiliate Window

Think through the relevant stages a lead may pass through that can be measured for your business. If you cannot measure what’s required, you’ll need to make provision to do so. This can involve discussion with colleagues and other third parties.

Something else to consider is the stage at which a lead has become dormant. This is important in terms of factoring in how to bring a dormant lead back into play at a later date, as it still has value as a prospect, whether present or future.

The following are typical measurement KPIs for the main types of lead generation campaign:

Email registration

Open rates (ORs)

The percentage of emails broadcast that are opened. This measurement will vary over time in relation to the number of emails the prospect receives.

Click through rates (CTRs)

The percentage of emails opened where the recipient clicks on links to the website, again relevant to the number of emails the prospect receives.

These two metrics provide a fast benchmark for comparisons. Over time, these can also provide other indicators. For example, datasets achieving a certain percentage of clicks by the third send, for instance, may have a strong propensity to buy and are therefore sources worthy of continuing investment.

Conversion to sale

This is key, although sales can take longer to achieve with certain products. E.g. insurance or mobile phones typically have a 1-2 year buying cycle, and hence open and click through rates are here equally as important earlier on as indicators of responsiveness.





Cumulative revenue

Reporting

The master report for this campaign needs to demonstrate the time period (month, week, day) during which the data was purchased, the overall results from that period and the current CPA (which will naturally lower over time as more sends are broadcast and more prospects become customers).

Note: with any type of campaign, as the status of each lead regularly changes, it's important to refresh the reporting to show the current status of all the data. This will help conclude at what stage leads become dormant.

Brochure request

Measurement for brochure requests involves two processes:

Direct

Enquiries/sales can be seen from the specific phone number and/or URL listed on the brochure itself.

Indirect

Matching back customers within the acquired lead database against the general customer database/inbound call centre. With indirect matching, consider if the customer was already in the database before the lead acquisition on this particular campaign. If so, think what a sensible 'cut-off' would be for this to be considered a re-introduction, and thus for the lead source to be credited.

For example, a double glazing merchant may deem this a re-introduction after twelve months has lapsed.



KPIs for brochure requests are:

- Conversion percentage of leads to enquiry (booking an appointment, test drive, consultation etc.) and the cost of the enquiry
- Conversion percentage of leads to sale and the cost per sale
- Latency from brochure dispatch to enquiry/sale (to steer ROI timeframes on future leads acquired)
- Total sales revenue

Call back request

Latency is the time between request for call back and the call being executed. You will find a direct correlation between speed and conversion success. Decay on data is an important consideration. Perhaps you need to lower the volume of leads to improve this metric?

The percentage of calls that convert to an appointment/consultation booking will indicate the strong and weak conversions. Does it vary by lead source? Could there be issues with the call centre script or the performance of individuals? It's vital you have that level of data visibility!.



3.6

A Guide to Mobile Lead Generation

What is mobile lead generation?

A lead on mobile is simply a declared and verified interest or enquiry by a consumer in a brand's product, sourced through either a phone or tablet. Lead generation has been a staple of the desktop internet for many years, effectively creating the performance marketing industry.

The world is now changing however, and mobile can offer marketers many more ways to generate enquiries from consumers.

First it's important to define the mobile environments – mobile web and app should be treated differently.

Lead generation - Mobile web

Mobile web does in some ways mirror the desktop internet in terms of the type of campaigns available. However, there is a big difference between the two when considering landing pages, creative, optimisation and tracking. Available campaigns for mobile lead generation from display and search predominantly include:

User detail acquisition

Name, email address and phone number on a short and clear form. The form must be mobile optimised. Consumers generally view only three pages on mobile sites and so this must be considered.

Call generation

'Click to call' or inputting phone numbers to receive a 'call back' plays well to these devices' strength. Freephone numbers must be used, and this type of campaign lends itself well to detail-heavy leads for sectors such as insurance and banking.

Requesting information

Obviously mobile devices are used on the move, and as such, allowing a consumer to request more information to view at a later date works well. Car brands have understood this for years and brochure requests work well, for example.

Click to buy

M-commerce is still in its infancy, however, more and more products are being purchased via mobile devices. Brands should deep link from the ad directly to the product and also ensure a mobile-friendly checkout is in place.

by Logan Jory

Business Development Manager, Linking Mobile

Lead generation - Mobile apps

Mobile applications (installs and in-app sales) dominate the mobile advertising industry and constitute a primary way for brands to achieve mobile leads. Unlike the mobile web environment, apps require different tracking, optimising and reporting technologies. According to the IAB's latest audit, 44% of the top 250 brands' apps are not transactional, which shows that this market has plenty of room to grow.

App installs

A brand wishing to promote its app must include mobile display advertising, as it's the key way to drive installs. Reaching the top of the Apple or Google Play Store rankings will then generate significant organic downloads. Ensuring the app is a suitable size, easy to navigate and available on all OS versions is critical. Also including bespoke mobile-app-tracking software is also a must.



In-app leads and sales

Most mobile-savvy brands are now moving beyond the install and optimising to an in-app event. These can be registrations, subscriptions, in-app purchases or any in-app custom event defined by the advertiser. Understanding which sources of traffic are delivering these events is critical. Lifetime value (LTV) of an app customer can then be calculated.

The functionality of deep linking within apps will be crucial to mobile lead generation in the future. This is where a user clicks on an ad and is directed straight into the app on their device. Inherently linked to search, indexing search results in apps will open up more lead generation opportunities at relevant points in-app.

Once it becomes more readily available and marketers adopt more mobile practice, expect a shift from current cost per app install (CPI) buying to those based on specific destinations within an app, as it is on desktop and mobile web.





App retargeting

It is possible, via the use of bespoke technology, to retarget app users with relevant messages or even app updates. This is useful when a brand wishes to re-connect with high LTV customers.

This is an emerging area and should be approached carefully – particularly in the handling of user data and device identifiers.

Tracking and optimisation

There are three methods most often used in mobile lead generation:

- HTML pixel on a mobile-optimised confirmation page
- Server-to-server integration: confirming unique IDs on conversion between advertiser and media supplier
- Third-party app-tracking SDKs

Pixel

Pixels, or '1x1', will be familiar to advertisers in the desktop world. These are easy to implement and will only work within the mobile web environment. The pixel is placed on the mobile-optimised page and can be linked back to the vendor who delivers a lead. Cookies are problematic on mobile and so marketers need to ensure that the methodology overcomes this potential issue.

Server-to-server

Server-to-server solutions are when an advertiser receives IDs from a vendor's click and then matches and returns the information via a server. This means the advertiser is in control as to when a lead is confirmed and does not rely on cookies.

App tracking

App tracking is generally handled by third-party specialists. This requires some code (an SDK) to be inserted into your application. Reliable vendors will have direct connections with these app-tracking services, and data is passed between the two to confirm when installs and in-app events have occurred.

3.7

High Flying Leads Save Lives

.....

Case study: Air Ambulance charity dynamic regional lead generation

The brief

Unity4, a call centre specialising in fundraising, was looking for a solution that could support a number of regional Air Ambulance charities in their efforts to acquire new regular givers. Outbound telemarketing was to be used to contact individuals who had explicitly expressed interest in supporting their local Air Ambulance service. Each regional Air Ambulance charity operates separately and services a specific region defined by a list of postcode ranges.

The channel

Co-registration was selected as the appropriate channel that could generate the volume of consented leads required across the UK, while having a data cost and conversion rate that would meet the charity's cost of acquisition.

The creative

Brand and campaign-specific, only shown to people from the relevant postcode range

'At [Brand A] Air Ambulance we love our city and we know that you do too. However, we have a challenge: we only have one helicopter available to cover the 10 million people here.

Would you be interested in receiving information on how you can help us fund a second helicopter?'

Generic, shown to everyone

'Your local Air Ambulance service provides a vital service for injured persons in your region, but they receive little or no government or lottery funding. Without public support this critical service would be lost.

Would you be interested in receiving information on how you can help?'

3. Dynamically localised, shown to everyone

'Your local Air Ambulance service provides a vital service for injured persons in Northampton, but they receive little or no government or lottery funding.

Support your local Air Ambulance in Northampton?

Yes, I want more information.'

By Jon Ostler, Managing Director, Cohort Global

Lead routing

To support the generic and localised offer questions, an intelligent lead routing system was deployed that routed leads to the correct campaign based on a postcode look-up routine. This allowed publishers to run a single offer question to all their visitors while allowing Unity4's clients to buy leads on a regional campaign basis.

A local touch

Unity4 continued the theme of localised intelligence by routing the leads to the consumer's nearest work-from-home outbound operator. This meant that consumers received a call from an operator with a relevant regional accent and local knowledge.

The results

The campaign was a success and resulted in additional budget being allocated to the channel and lead generation. Decision maker conversations (DMCs) rates were 66%, with conversion rates of 8.5%, easily meeting the charity's cost per acquisition targets.



3.8

Sky Sports TV: Case Study

Campaign dates: February 2013 – December 2014

Objectives

Sky Sports TV wanted to acquire new users for their Sky Sports TV app, available on Android and iOS devices. The app enables users who aren't Sky customers to access Sky Sports channels, through their smartphone or tablet via an app.

Strategy

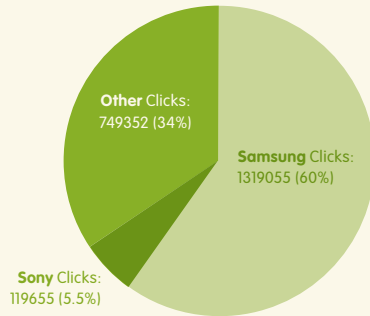
There's a balance advertisers face making between achieving scale and buying on a metric closest to sale. Advertisers want to buy their objectives directly but on a vast scale, and often the two can't be combined so easily.

This SSTV campaign is a perfect example of strategizing beyond this problem. We advised and implemented a hybrid campaign that remunerates publishers on two conversion points:

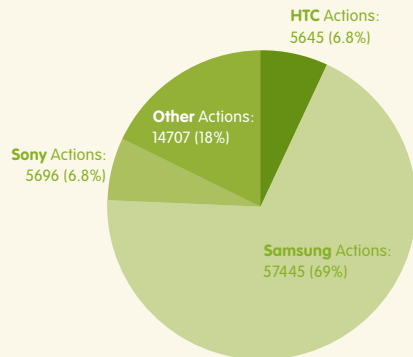
1. Cost per install (CPI) on new user download and open of the app
2. Cost per acquisition (CPA) on in-app subscription of either £5 or £10 per month, depending on the level of channel access selected.

Although this type of CPA campaign is well versed in the affiliate industry, the two-tiered app install and in-app purchase campaign seen here is fairly unique, and the fact that a client such as Sky is investing in mobile in this way is a strong sign that mobile performance is only going to grow further.

Tracking was facilitated by a third-party app-tracking SDK implementation in both the Android and iOS apps in order to measure app downloads and in-app user behaviour.

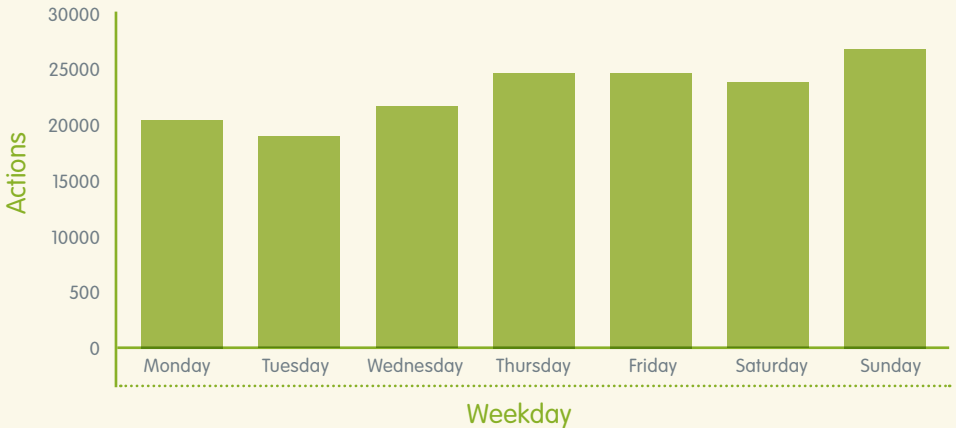


Manufacturer



Manufacturer

by Logan Jory Business Development Manager, Linking Mobile



Publisher placements

Only non-incentivised mobile display traffic was used for this activity, in order to increase the conversion rate from download to in-app subscription.

Mobile web and in-app display banners were placed on relevant content mobile sites and apps around specific sports interests, entertainment and demographics, as well as more premium placements in line with Sky's premium brand positioning.

Specific sporting event-led creatives (such as F1 races or Champions League fixtures, for example) were supplied by MediaCom in order to serve ads to more specific audiences and increase publishers' performance.

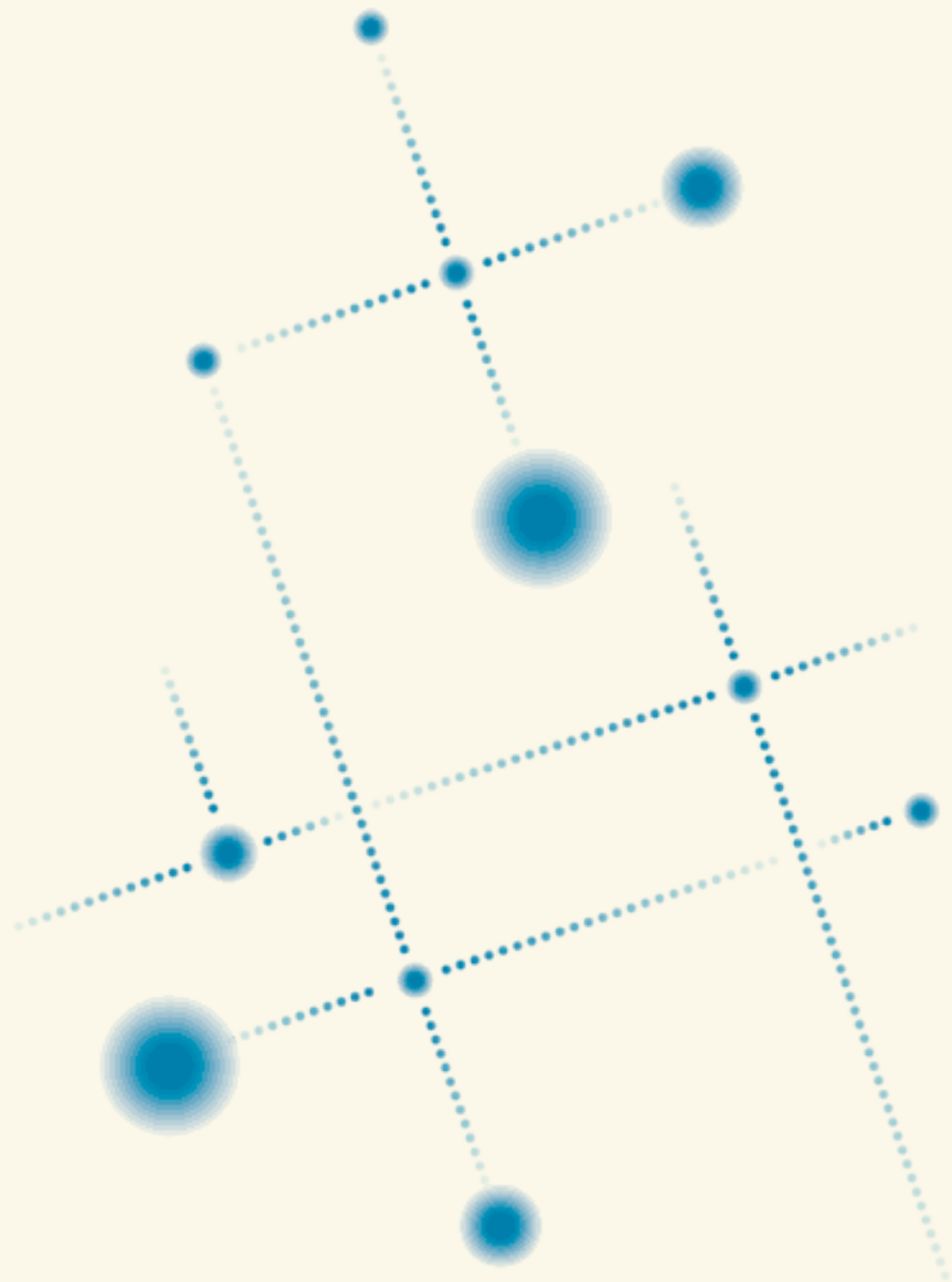
Insights and learnings

- On Android, Samsung devices accounted for 60% of total clicks but 69% of total conversions
- Inferences of a better user journey for Samsung devices over Sony and HTC can be made
- 6pm-7pm most active time for users downloading and subscribing
- A steady increase in conversions was seen from mid-week to Sunday (the most active day for conversions)
- Exclusive sports events for Sky such as Super Sunday may have been the cause for this skew

4



Policy and Governance





The online lead generation industry is governed by a combination of statutory rules and self-regulatory controls. Self-regulation and best practice guidelines supplement legislation and are particularly effective tools for raising the quality and standards of business practices, whilst offering a quicker way to respond to changing market developments.

The legal framework in the UK

The Data Protection Act 1998 (DPA) and the Privacy and Electronic Communications Regulations (PECR) are the building blocks of the legal framework for online lead generation in the UK. The Information Commissioner's Office (ICO) regulates both the DPA and PECR.

The DPA sets out eight good practice principles, which stipulate that personal data – i.e. data which can (1) by itself or (2) in combination with other information identify a living individual – must be:

- Fairly and lawfully processed
 - Adequate, relevant and not excessive
- Not kept longer than necessary
- Kept secure
- Processed for the intended purpose
- Accurate and up-to-date
- Processed in line with an individual's rights
- Not transferred to non-EEA countries that do not possess adequate data protection rules (determined by the EU)

By Yves Schwartzbart Senior Regulatory Affairs Manager, IAB

.....

An individual's consent to receive marketing is a key factor in online lead generation, whether this relates to compiling, buying or selling marketing lists, particularly where these are subsequently used for telemarketing or electronic marketing purposes. This type of marketing requires very specific consent, making indirect consent – i.e. consent originally given to another organisation – only valid when it is sufficiently clear and distinct.

Providing transparency in the process of asking for contact details is fundamental in keeping within the law. Giving a false idea of the purpose for collecting data – e.g. concealing it as a survey – must be avoided. Concise and prominent privacy policies, using simple and easy-to-understand language, are a good way to tell individuals that their information will be used for marketing purposes. Privacy policies also provide a good place to disclose with whom this data will be shared and to name the relevant organisations, where possible.

A good marketing list is therefore one that is accurate, up-to-date and can provide full details of how it was generated and who it will be shared with (if applicable), and has on record what individuals consented to, when and how. Failure to abide by the rules can lead to enforcement action by the ICO, which has the power to issue fines of up to £500,000. Businesses should familiarise themselves with all relevant ICO guidance documents – which are available on www.ico.org.uk – to avoid any headaches.

Finally, those commissioning and creating online lead generation campaigns must also make sure to comply with all relevant rules set out in the UK Code of Non-broadcast Advertising, Sales Promotion and Direct Marketing (CAP Code), which is administered by the Advertising Standards Authority (ASA).



Industry best practice

The online lead generation industry has a long history of establishing self-regulatory rules through the IAB to promote good practice in the marketplace. Some of these provide guidance to reinforce existing laws (as described above), while others seek to improve the trading environment in which online lead generation companies operate.

IAB Online Lead Generation Council – Best Practice Guidelines

A practical and easy-to-follow step-by-step guide for planning and buying a lead generation campaign that can be included as part of any lead generation purchase agreement. The document recommends – amongst others – to:

- Obtain the express consent from the individual using an opt-in checkbox as a minimum
- Show a clear commitment to avoiding misleading consumers, collecting relevant information only and giving individuals an opportunity to have their data deleted / deactivated
- Agree data capture forms, creative and the use of incentives with the advertiser prior to a campaign going live
- Decide in advance on who will capture the lead data, whether the lead will be exclusive to the advertiser and who the lead will be validated by
- Arrange by what means the lead will be generated and by what method the leads will be delivered to the Advertiser



IAB Data Transfer and Security Best Practice

This document is a starting point for all practitioners seeking to implement or deliver best practice with their data transfer processes. It outlines the high degree of compliance required around the collection and storage of consumer data, and establishes best practice guidelines such as:

- Live feeds as the preferred method of data transfer
- Avoiding batch files where possible, as they are susceptible to discrepancies and increase data security risks
- Data storage should match the standards of the data owner and the requirement of the law

Automotive Online Lead Generation Best Practice Guide

This guide sets out clear best practices for the Automotive Online Lead Generation sector. It describes each process relating to the capture, management and trade of online lead generation data, and clarifies the roles and responsibilities of all stakeholders.

5



Glossary



Glossary

Batch file: Multiple leads stored typically as CSV, sent periodically between seller and buyer.

Branded form: A standalone lead form inclusive of advertiser branding used to drive exclusive leads specific to one advertiser's product or service only.

Buyer: The party purchasing leads generated.

Co-registration: A marketing method (often referred to as co-reg) whereby publishers include in their own sign-up paths other marketing campaigns that users can register for simultaneously.

CPAD (Cost per activated download): A payment model used to describe the commissionable action of an activated download. Tracking fires when the collateral, be it app or software, is opened rather than when it is downloaded to the device or desktop.

CPD (Cost per download): A payment model used to describe the commissionable action of the download of an app, piece of software, toolbar or other collateral to device or desktop. Typically used within campaigns seeking to drive app downloads to a device.

CPI (Cost per install): Please see CPD.

CPL (Cost per lead): The amount agreed to pay for an individual lead.

Generic quote request form: A standalone, non-advertiser specific lead form used to drive leads for a specific product or service. These leads are often non-exclusive and can be provided to multiple advertisers for facilitation

Host and post: The practice where an advertiser collects internet leads by allowing publishers to host the advertiser's web form. Typically the consumer completes the process on the advertiser's website.

Lead buyer: See Buyer.

Lead capture: The process through which you generate prospects and leads, typically in the form of landing page forms, emails and phones.

Lead decay: The description of lead data becoming less responsive over time if not actioned quickly.

Lead form: A page either on an advertiser's website or a standalone URL where traffic on the campaign is directed. The form can contain various data fields to be completed by the prospect in order to capture their details (such as name, phone number and address); the form is then submitted, with the prospect's explicit consent to be contacted, to the Advertiser.

Lead generation: The marketing process of stimulating and capturing interest in a product or service for the purpose of developing a sales pipeline.

Lead nurturing: The process of building relationships with qualified leads, regardless of their readiness to purchase.

Lead scoring: The technique of assigning leads a score based on points given to a lead's behaviours and activity for the purpose of converting into sales.

Lead segmentation: The process that allows you to categorise your leads in order to get the right audience for your marketing campaign as a means to improve effectiveness.

Lead seller: See Seller.

Offer question: The informative copy and call to action aimed at encouraging a prospect to opt in to receive information from an advertiser. Usually used in conjunction with co-registration paths, whereby users have already logged into the website with their details. By opting into the offer, their details are passed as a lead to the advertiser.

Ping tree: The process of brokering a lead between multiple buyers simultaneously and in real time.

Ping post: A method in which partial lead data is sent to a buyer (the ping) who in turn bids for the lead if desired. Once the bid is accepted the full lead is delivered (the post).

Posting doc: Typically a set of instructions or an agreed format in which lead and field data must be sent.

Response token: A response signal, typically in the form of a single word or number, supplied by a lead buyer to indicate the outcome of a lead purchase, i.e. Success, Duplicate etc.

Seller: The party selling lead data that has been captured.

Validation: Checking the format of the text or values that are input to the lead form. This prevents the lead being able to submit their request until the validation is correct. The specific checks will vary dependent on the data set being captured, however typically cover phone number (are there the correct number of digits? Does the number begin with relevant values for a landline or mobile?), email address (identifying any syntax errors), address (is the postcode formatted in the right way?) and so on and so forth. More sophisticated logic can be applied depending on campaign requirements, for example, does the phone number area code match the relevant postcode?

Verification: The process by which a lead and its individual fields are further scrutinised and proven to be accurate and valid post submission via a form. The checks typically occur against third-party systems or bespoke campaign logic to decipher the lead's validity. Examples of verification include looking up an address against the PAF (Royal Mail) database, landline/mobile connectivity checks (is the number live and connected?) and deliverability of an email address (does it hard bounce?) etc.

The production of this handbook has been made possible by the Online Lead Generation Committee, who have produced all of its content and sponsored its production.

In particular we would like to thank the following workgroup members who have planned and overseen its creation:

Michelle O'Sullivan and Alfie Bektas, Affiliate Window; Paul Wright, CAKE; Jon Ostler, Cohort; and Rishi Kapoor, Monster.

Senior Industry Programmes Manager
Clare O'Brien, IAB

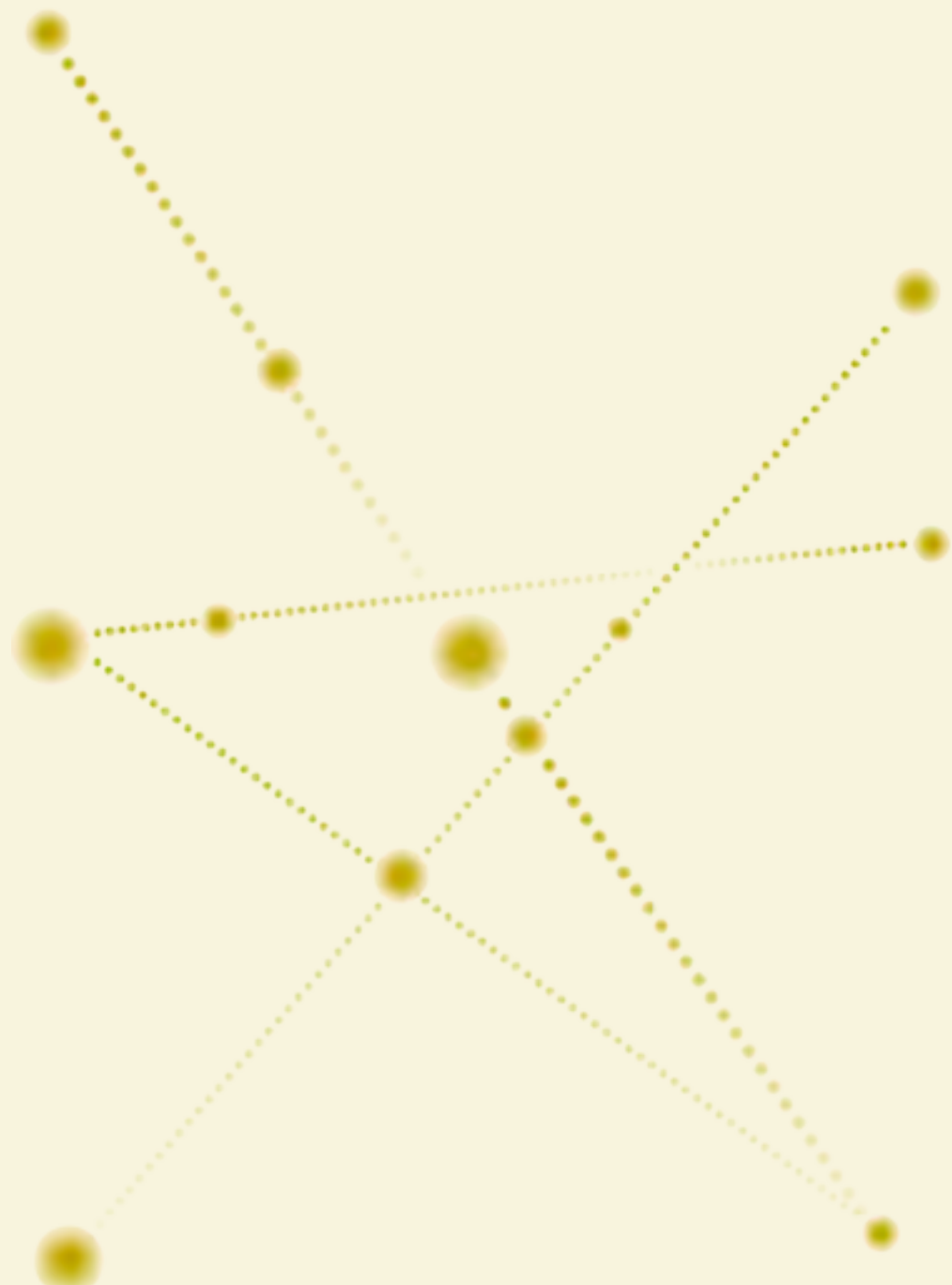
Senior Programmes Executive
Flossie Draper, IAB

Production managed by:

Marketing Manager
Chloe Burrell, IAB

Acting Senior Marketing Executive
Caroline Manson, IAB

April 2015





Internet Advertising Bureau UK



Internet Advertising Bureau
14 Macklin Street
London
WC2B 5NF
0207 050 6969
info@iabuk.net
@iabuk
iabuk.net

