Great Place To Work®

Great Place to Work finds a great way to route leads using Openprise

With competition for top talent at an all time high, businesses around the globe are looking to create names for themselves as great workplaces. Those who really want to stand out from the crowd turn to Great Place to Work®. The company certifies businesses by gathering feedback from employees on their experience. Companies that meet a designated threshold are given the distinction of Great Place to Work-Certified™ and go on to be considered for more than 20 additional Best Workplaces lists, including the flagship Fortune 100 Best Companies to Work For® list. But behind those lists, there's a whole lot of data going on, and it all starts with data cleansing, lead routing, and Openprise.

Results

✔ Achieved a 38% increase in win rates

✔ Reduced response time from 5 hours to less than 1 hour

✔ Increased close rates by up to 10%

✔ Reduced incidence of unqualified leads by 79%

Missing great opportunities

"Our lists and content are very popular, driving high web traffic and inbound interest," said Pat Lechner, Operations and Analytics Director at Great Place to Work. "We have more than 20 places on our website where a visitor can express interest in learning more about our offerings. We know that the faster we answer those inquiries, the more likely they are to turn into customers. At the same time, we know that all inquiries are not created equal," he explained.

Pat and his team had a unique challenge: the company sells three tiers of products, and the sales teams—incented by higher commissions—were focused on the higher-dollar leads, letting some of the lower-tier inquiries fall by the wayside. Amplifying the problems were the international inquiries that should have been routed to one of the company's 40 global affiliates. On top of that,

Great Place to Work wasn't using standardized web forms—some asked for job titles, others asked only for industry, and there was no way to get those leads into Salesforce in a consistent manner.

To make sense of prospects' interest, the team brought on five full-time employees, two of whom were 100% dedicated to manual lead routing.

A great place to experiment

Pat and his team ran an experiment to solve the company's multiple lead management problems. His first step was to develop a set of customer personas and create the following segments: leads likely to be interested in top-tier products, the prospects likely to be interested in low-cost options, and other interest types that weren't sales leads at all.

Armed with this data, the team at Great Place to Work implemented three changes to their processes:

1. **Normalizing the input forms and standardizing the answer format**

   The team realized that some of the typical values used by sales organizations to create territory rules were irrelevant, and therefore they didn't need to collect information like industry or state. Rather, job role proved to be the most valuable indicator of product interest, as well as the location on the website where the person expressed interest.

   It was easy enough to require a role value on any new inquiries, but applying this logic to the existing database was difficult.

   Using Openprise, the team was able to automatically assign a role based on a person's title. This enabled the team to understand the historic volume by interest to inform the model for distributing inquiries in an equitable way across the team.

2. **Continuously standardizing incoming leads and performing lead-to-account matching**

   The team at Great Place to Work uses Openprise to clean, normalize, infer, and enrich lead data on an ongoing basis, instead of as a one-time, manual clean-up.

   Openprise checks whether incoming leads match to an existing contact or account. If there's a match, it bypasses the routing process and appends the existing record with new campaign information.

Once the lead data is complete, Openprise converts the lead to a contact and associates the contact with the right account.

In the case of unmatched leads, Openprise automates the new account creation process and populates the account with the newly converted contacts.

3. **Experimenting with a sales team to handle low-cost leads**

   Great Place to Work used Openprise to route first-touch, net-new leads to an experimental sales team, which was tasked with responding to the "low-cost" persona leads. Since this experimental sales team was incented by deal volume rather than deal size, they were motivated to focus on closing deals quickly. The legacy sales team quickly realized they now had capacity to focus only on the high-value opportunities, increasing both their win rate and close rate.

Proving the hypothesis: the experiment becomes the best practice

Despite initiating the experiment just as the COVID-19 pandemic hit, Great Place to Work continued to receive a steady flow of leads through their revised, standardized web forms. The experiment reduced lead routing time from up to 12 hours, Monday through Friday, to 20 minutes, 24 hours a day. And because the leads are now better qualified, the lead-received-to-contact time dropped from five hours to less than an hour.

As a result of these process improvements, Openprise now manages the entire lead routing

process. Automating these processes also enabled Great Place to Work to promote two full-time processing positions to new, strategic roles.

Meanwhile, the reps working the higher-value, longer sales cycle sales now spend more time nurturing their opportunities. During the year-and-a-half experiment, Great Place to Work recorded an eight to 10% improvement in close rates across the entire sales team. Overall, they saw a 38% improvement in win rates.

On the horizon

On top of the improvements to KPIs, this experiment laid the foundation for more advanced segmentation and targeting capabilities. "We've always had a large and active lead database," said Katherine Gillman, Director of Marketing Operations, "But we struggled with understanding the relationship status of these individuals.

With all of our leads converted to contacts on accounts, we can now effectively differentiate between prospects and customers at scale. It was an instant bump to our prospect list and has opened the door for targeted outbound at scale."

> **"As a result of faster response times and higher close rates, we justified purchasing Openprise on this one experiment. It was an amazing success!"**
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> Pat Lechner,
> Business Operations and
> Analytics Director,
> Great Place to Work, Inc.