



Lead Generation Made MSPeasy

Tips and Tricks to Fill Your MSP Pipeline

Introduction

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

Many managed service providers (MSPs) struggle with lead generation because they lack the time and resources to dedicate to sales and marketing efforts. However, without a steady flow of prospective customers entering the sales pipeline, your business will not thrive. "In the tech world, if your business isn't growing, it's dying," said Dale Shulmistra of [Invenio IT](#), a New York-based MSP and Datto partner. "Lead generation is essential to grow your business."

In larger organizations, lead generation is collaborative effort between sales and marketing. For smaller shops, it might be a one person effort, but the concept is the same. Regardless of size, successful MSPs dedicate considerable time and effort to lead generation.

In this ebook, we will explore a variety of tried and true methods from IT service professionals and marketing experts for identifying, qualifying and nurturing potential customers.

In the end, the goal of a lead generation plan is for you to have a solid idea of how many potential customers, aka leads, you will need to generate in order to meet your monthly recurring revenue (MRR) goals.

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Create a Lead Generation Plan

The purpose of a lead generation plan is to create a list of potential customers with contact information. Plans will vary widely between companies. In the end, the goal of a lead generation plan is for you to have a solid idea of how many potential customers, aka leads, you will need to generate in order to meet your monthly recurring revenue (MRR) goals.

Calculate this number in 3 easy steps:

1. First consider your ratio of leads to closed deals.
 - a. For example, let's say on average you close one deal for every 10 prospects. If you need to add five new customers in Q1, you'll need a list of 50 leads.
2. Next, consider your average deal size.
 - b. For example, let's say your typical monthly contract is around \$2,000.
3. Using this information, calculate the number of leads necessary to meet your MRR goal.

Pretty straightforward, right? Many MSPs struggle to accomplish this because they don't have a person on staff that is dedicated to marketing. This is because most MSPs come from a tech background rather than a business background. However, if you are serious about growing your business, there is no other way around it.

According to Sitima Fowler, co-CEO of NY-based MSP [Capstone IT](#), the company's success largely comes from her dedication to lead generation efforts. "My primary responsibilities are marketing, business development and sales," she said.



If your intent is to grow, pick the most suitable person for sales and reduce their billing requirements [to let them focus on sales part-time].

Andrew Hutchison
Senior Infrastructure Consultant
Blackpoint IT Services

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This kind of focus allows Fowler to put in the sustained effort necessary to consistently develop new business. Fowler strives to delegate all technical and/or administrative tasks to other employees so that she can focus solely on business growth via lead generating marketing efforts.

While many MSPs don't have the option to move a current employee, especially a C-level figure, to marketing full-time, these efforts are not going to happen on their own. "If your intent is to grow, pick the most suitable person for marketing and sales efforts and reduce their billing requirements [to let them focus on these tasks part-time]," said Andrew Hutchison, Senior Infrastructure Consultant with [Blackpoint IT Services](#) in Tukwila, WA.

To ensure accountability, it is critical that you track your progress toward your lead generation goals we just calculated. There are a variety of methods to do this, from a basic spreadsheet to a sophisticated CRM tool. Bigger companies with a larger client base are more likely to benefit from these types of solutions. The approach you take for measuring your success will be dictated by the specific needs of *your* business.

Once you've selected your tools for measuring your progress, schedule regular meetings (monthly) with all responsible stakeholders to review your numbers. Are you on track? If not, brainstorm as a group new strategies to try in order to hit your numbers. According to Shulmistra, it is essential to map out your lead generation plans and vary your approach. "There's no magic elixir," he said. "When developing lead generation processes, you need to try different things and keep fine tuning over time."



For inbound marketing to be effective, you need to offer relevant and informative content that builds a meaningful relationship with your audience.

Yes, try new things, take risks and evaluate. Eventually, you'll want to build testing/evaluation into your processes as well. Keep track of what works over time and do more of that. Remember, what works for one potential client may not for another. So mix it up!

Inbound Marketing

One great strategy for generating quality leads is by offering gated content, or online materials, such as eBooks, webinars or videos, that require a user to fill out a form with their contact information in order to access them. This can be a particularly effective approach for generating solid prospects because it allows you to capture a lead while simultaneously gathering intelligence about them. For example, if someone is interested in attending a webinar about accounting best practices for small businesses, they might be interested in purchasing small business accounting software as well.

This approach is called inbound marketing, which became largely popularized by the Boston-based marketing software vendor Hubspot. Inbound marketing is the practice of using content to attract and engage a target audience with the objective of driving sales. For inbound marketing to be effective, you need to offer relevant and informative content that builds a meaningful relationship with your audience.

To build a following around the content you deliver, it's important to develop your own voice and perspective on a topic. After all, no one wants to read a long-winded, boring blog post with nothing new to add to the conversation. You need to inject some personality into your work. Make sure you focus on topics that are most relevant to the target audience of your business. For example, the owner of a small craft brewery probably doesn't care care about the tech specs of a cool new firewall appliance. That is likely a bit too technical for that sort of business owner.



While inbound marketing is all about luring an audience to you, outbound marketing is all about pushing content out to a wider audience. Inbound attracts while outbound interrupts.

However, they may respond to an article about another small business that avoided a security breach with a great technology in which you provided.

Current events are another fantastic way to capture attention and put your services into real-life context. And with all the data breaches going on these days, those articles shouldn't be difficult to find and write about. Lastly and most importantly, quality is always better than quantity when it comes to any content you deliver, particularly on your blog.

Outbound Marketing

Outbound marketing refers to the traditional use of external, paid channels to deliver a business message and content to an audience, rather than making your content available on your own properties. Some examples of outbound marketing tactics include email blasts to purchased lead lists, tradeshow sponsorships, radio ads and television commercials.

While inbound marketing is all about luring an audience *to* you with content customized to said group's interests and pain points, outbound marketing is all about pushing content/messaging out to a wider audience. Inbound attracts while outbound interrupts.

"Events are a particularly effective source of leads for Invenio IT," said Shulmistra. "I like meeting with people in person. You can look them in the eye and shake their hand. I find it easier to differentiate our services from our competitors in that environment."

For Capstone IT, a combination of inbound and outbound marketing tactics has served in generating a continuous stream of new business opportunities. This multi-faceted outreach allows the company to reach a variety of different

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audiences via an assortment of mediums. In particular, seminars and speaking events have been effective methods for lead generation for the MSP. The company also uses direct mail, email, Google ads and social media to reach their target audience. CEO Sitima Fowler blogs regularly to drive traffic to the company website. "You need different types of media to reach different types of people," she said.

Shulmistra also uses both inbound and outbound marketing for lead generation. The [Invenio IT blog](#) is updated daily and Shulmistra is active on a variety of social media platforms. "It's about being a thought leader in the industry and presenting Invenio IT in that light."

"It's all about education," according to Fowler. "In smaller cities like Rochester, many small businesses don't know about or understand the value of managed services, so you have to show them."

Email Marketing

In a recent MarketingSherpa survey, 81% of marketers said email is the most effective channel for communicating with potential customers. Many email marketing campaigns take a newsletter approach. For MSPs, email newsletters might include:

- New services or technologies
- Customer testimonials
- Recent blog posts or other articles
- Upcoming industry events (meet me!)
- Recaps/photos from past events



Email personalization improves the click-through-rate of an email by an average of 14% and the conversion rate by 10%, according to research from the Aberdeen Group.

Capstone IT sends a bi-monthly newsletter to prospects and clients that features helpful, educational advice, such as SMB security tips. In addition, they send email promotions for new ebooks or blog posts that are aimed at driving a potential technology consultation. According to Fowler, email marketing is all about the soft touch. "We have found that leading them to an informative piece of content is more beneficial and doesn't make the recipient feel like they are immediately being forced to buy something."

Personalization is also important for driving the success of an email campaign. In the cluttered sea that is an inbox, your message needs to stand out. This is easy to do through personalization of said email. For example, you can include a person's first name in the opening greeting. Email personalization improves the click-through-rate (CTR) by an average of 14% and the conversion rate by 10%, [according to research from the Aberdeen Group](#).

Your email communications should include an effective call-to-action (CTA), which is an instruction that provokes an immediate response, such as reading a blog post or downloading an eBook. Marketers call this type of action a "conversion." According to MarketingSherpa, a conversion is "the point at which a recipient of a marketing message performs a desired action."

Getting someone to open an email is a prime example of a conversion. Having them click on the a link inside that email to drive them to your website is another, even better example. The ultimate conversion: buying your product and/or services.

CTAs drive a prospect or client to additional content from you business, which can turn colder leads into warmer ones. In this very eBook, you will see examples of this practice. We are cross-promoting other MSPeasy series pieces throughout this PDF - see them? Did you feel tempted to click on any of them?

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Social Media Marketing

Like email, social media is a highly effective tool for engaging with current and potential customers. In fact, 72% of Twitter users are more likely to make a purchase after engaging with a brand on the platform. Sharing your content on popular social media platforms such as Twitter, Facebook, and LinkedIn can drive readers to your website, boost traffic and bring in new and quality leads.

Look for opportunities within social media platforms to direct readers to your content. On Twitter, using hashtags is a quick and easy way to attract *the right* audience to your company website. For example, let's say you have a blog post on ransomware you'd like to share. When composing this tweet, make sure to include #ransomware to ensure you will be pulling in an audience interested in that specific topic.

LinkedIn Groups allow people in the same industry or with similar interests to share relevant content. Google+ offers similar communities like this. Increasingly, Facebook is becoming a content distribution platform. According to Hubspot, content consumption on Facebook has increased 57% over the past two years and 76% of people said use their Facebook feed to find interesting content.

Most social media platforms offer free analytics tools that you can use to track the performance of specific posts. For example, Twitter offers native analytics that allow users to track the number of retweets, profile visits, mentions, new followers acquired, etc. You can also view impressions (how many people saw your tweets). Facebook and LinkedIn offer similar tools. To learn more about social media marketing, download our Social Media Made MSPeasy ebook. ← (See *what we did there?* Here's another example of a marketing CTA at it's finest!)



Your company can have the best product, service, and price, but if prospects can't find you when they're searching online, they'll never know about you.

Optimize Your Website with SEO

Search Engine Optimization (SEO) can be a game changer for your company. Your company can have the best product, service, and price, but if prospects can't find you when they're searching online, they'll never know about you.

SEO uses a combination of both technical and creative elements to improve a website's rankings in search engine results, which drives site traffic and increases brand awareness.

SEO keywords are relevant words and phrases in your content. Search engines like Google, Bing, and Yahoo crawl sites in order to find the most relevant web pages for a given search query. So, if you are an *IT service provider* who serves *Massachusetts' South Shore*, for example, you need to have those keywords in your content.

Consider your audience when keyword planning. For example, your potential prospects might be searching for things like: *IT help for small businesses*, *IT consultant*, etc. There are a number of online research tools that can help you create a list of keywords to target, including: Moz Keyword Explorer, Google Adwords Keyword Planner, Keywordtool.io, and the SEMrush Keyword Research Tool.

Keywords should be used within content in a number of strategic locations. These include:

- **Title/H1 Tag:** Title of the page and headline tag
- **URL:** www.datto.com/keyword
- **Meta Description:** The description that is displayed in search engine results
- **Image Alt Text:** The text you see when an image is unable to load, or when hovering your mouse over an image

Qualifying leads is about determining whether or not it's worth investing time and effort into selling to a given prospect. If you're not qualifying your leads, you will waste a lot of time following up on leads that aren't really a good fit for your company.

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All of these SEO efforts will drive traffic to your site. Once they land there, make sure you've provided ways to capture contact information from visitors so you can continue engaging with them. As noted at the start of the ebook, offering gated content is a popular approach. Another tactic to gather contact information from leads is through the use of "exit intent" pop-ups, which appear on screen just when a visitor is about to leave your site. Let's say someone finds a blog post on your site via Google search. The post may be interesting to them, but it's not likely they are familiar with your site or what your business offers. A well-designed exit intent pop-up encourages a conversion or a further page view on your site.

Finally, use Google Analytics to monitor the number of pageviews to your site over time. Use this number to gauge what is garnering the most attention (and also what is pulling the least amount of attention). These stats will help you understand the interests of your audience and craft valuable content they want to read.

Qualifying Leads

Not all leads are created equal. So, you need to learn more about the lead to determine whether a prospect could become a paying customer. This process is known as "qualifying" leads, or determining whether or not it's worth investing time and effort into selling to a given prospect. If you're not qualifying your leads, you will waste a lot of time following up on leads that aren't really a good fit for your company.



People get what they pay for, a serious consideration for an end user evaluating data protection solutions. Ask them, "if you were evaluating a parachute before going skydiving, would you choose the cheaper option over the higher quality one?"

To properly qualify a lead, there are a few pieces of information you need to gather. First, who is your ideal customer? Look at the best of your current customers and create a profile based on said companies' characteristics. These might include: the size of the company, the number of desktops and servers protected, the amount of data under management, the industry, etc. Probably a combination of all of these factors. Next, you will need to determine who is the typical the technology decision maker within these personas. Is it the company owner? Or will you be working with an in-house IT staff? It might be both. When you're reviewing your leads, prioritize the ones that fit your ideal customer persona - call them first!

Once you've gotten the decision maker on the phone, you'll need to assess their specific technology needs. Will you be the primary IT provider for the company, or will you only be delivering a specific IT service/solution (e.g., business continuity or networking)? You also need to determine the typical timeframe around closing the deal. Ask them how long will it take to solidify the purchase? Are they ready to make the technology purchase this week? Or are they looking to make changes by the end of the year? Maybe they're not ready to buy now, but will be in the future and you can follow up.

During these initial conversations, look for red flags that indicate the prospect might not be a good fit for your services. "It's extremely important to find out if a prospect is the right type of customer," said Shulmistra. "Do they value technology? Find that out quickly rather than dragging it out. It's usually not worth the effort to try to educate them. You'll never convince them if they are just looking for the cheapest price."



You should also consider your competition. Are they working with an IT provider now? How can you differentiate your services from whoever they are currently working with? How can you stand out from additional competitors as well. You need to be prepared to communicate the value of your business quickly and clearly.

Lastly, many IT providers, especially those who are new to the business, make the mistake of pricing their services too low. Shulmistra said this is because they try to beat their competitors on price. "Some people think loss leader pricing is acceptable," he said, and suggested an alternate approach. "Consider how you differentiate your services from what they offer and be ready to communicate why your service commands a premium price." Remember: people tend to get what they pay for, a serious consideration for an end user evaluating data protection solutions. You might ask them, "if you were evaluating a parachute before going skydiving, would you choose the cheaper option over the higher quality one?"

Conclusion

Yes, lead generation is a challenge, but starting with this variety of time-tested strategies from fellow MSPs should help you along your way. If you are serious about growing your business, you need to dedicate time to lead generation. This might mean hiring additional staff that can focus on business development full time. Or, it might mean carving time out of a current employee's schedule to dedicate to lead generation.

Effective lead generation requires you to be flexible and try different approaches. Experiment with different strategies for obtaining leads and communicating the value of your business to them. Don't create messages around your product. Instead, focus on the pain point in which your services will alleviate. Lastly, as with anything in marketing, constantly monitor the metrics around your campaigns so you know what works and what doesn't over time. "It takes a lot of time and effort and it's not going to happen immediately," said Shulmistra. "You have to keep refining your processes."