Lead Activation Book

A brief introduction to a very important concept
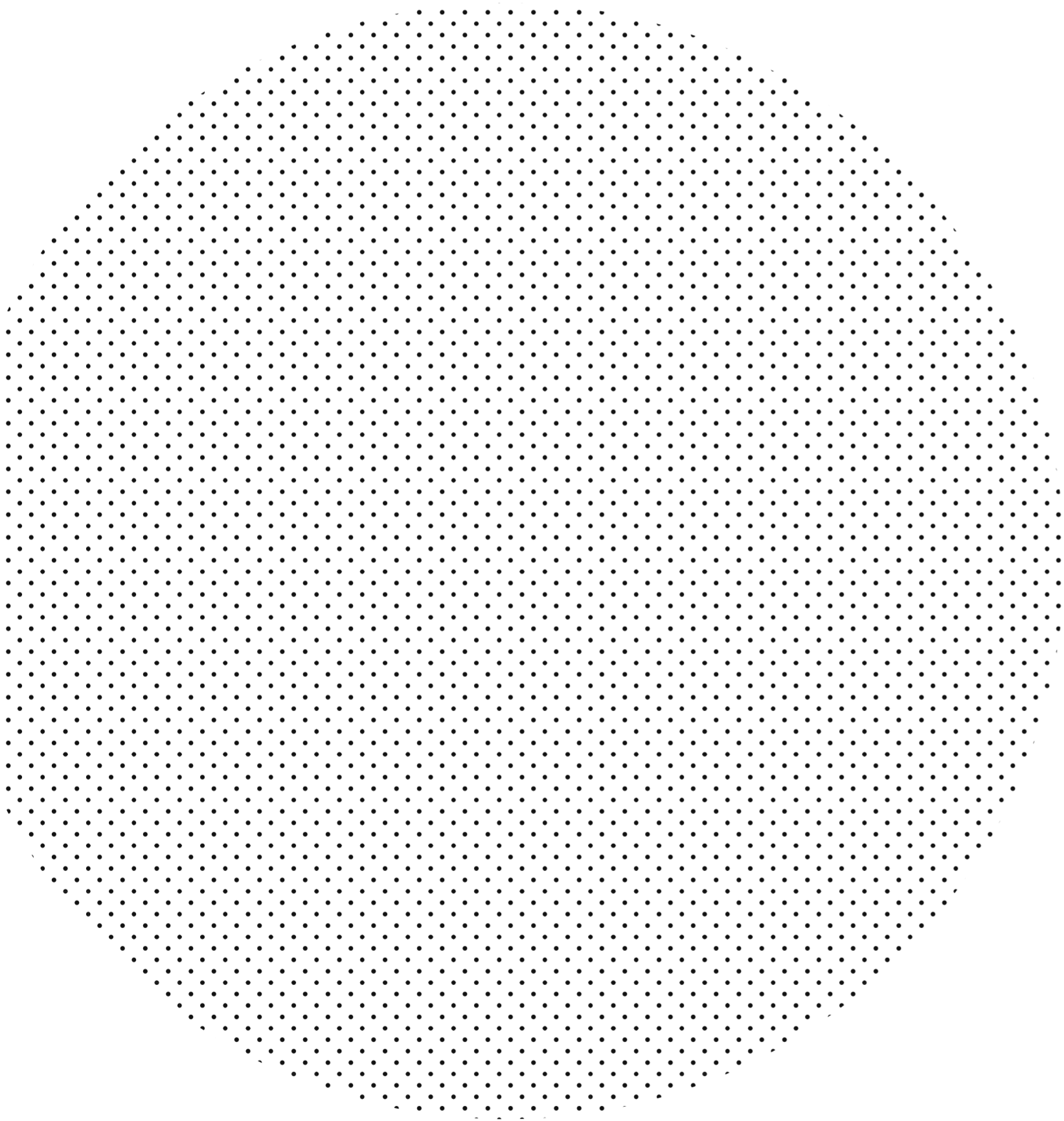
byside

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A message from our CEO

Although we live in the digital age, it is becoming increasingly difficult to talk about Digital Marketing because of its broader scope and the risk of being a little bit of everything and nothing.

Lead Activation is a particular and significant part of the digital journey, complementing Lead Generation with the intelligence needed for structured optimization, lead management, automation, and multichannel conversion, with the capability to unify web and contact centre experiences.

When we started BySide and our Lead Activation Journey, we always explained that our work begins where most Digital agencies end: while Lead Generation focuses on generating traffic and has a global standard rate conversion of 2%, Lead Activation focuses on optimising the remaining 98% (yes, that is a significant number!).

We address the other 98% by taking Marketing and Sales strategies in our terms, incorporating new ways of reaching customers - with human, fully digital channels, or both - and connecting them through automation and personalisation.

Remember, Lead Activation is not about replacing existing services or platforms. First, it's about taking good care of the data generated by these services and orchestrating it

to connect your internal and external digital ecosystem. Secondly, to act in real-time while prospects or customers are still in the digital channels and nurture them through the global journey, maximising conversions and lifetime value.

I encourage you to initiate your Lead Activation Journey through our free Lead Activation diagnostic tool, so you can see where your company stands on the Lead Activation scale. I also challenge you to explore our Lead Activation Book. Good reading!
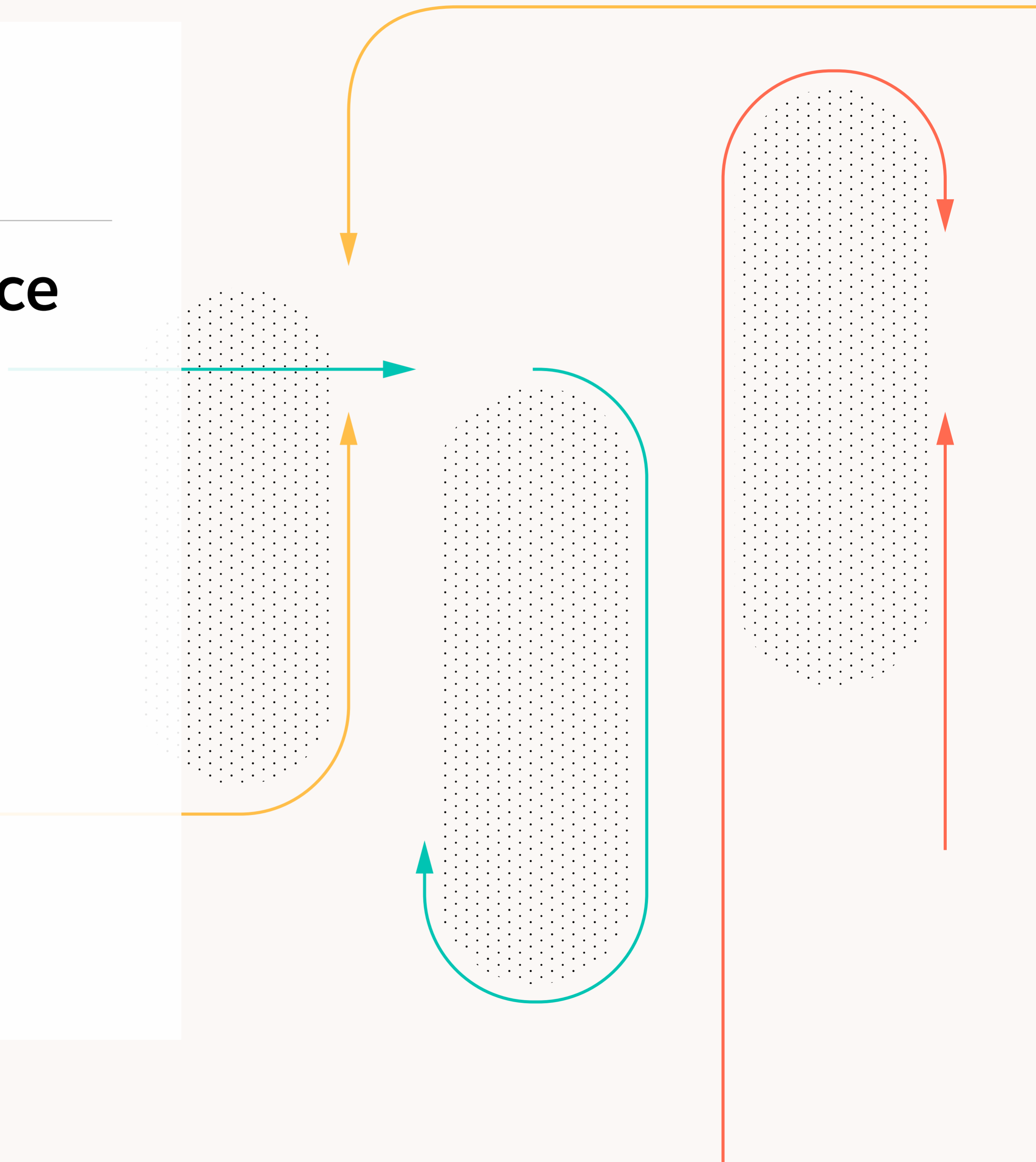
Sincerely,

Vitor Magalhães
CEO & Cofounder

Let us introduce ourselves

1.1. BySide: Making things work since 2006

BySide was founded in 2006 in Porto, Portugal, to help companies accelerate their growth, connecting online and offline worlds.

It all began with a simple observation: while Internet access and the World Wide Web were growing, not everyone was prepared to shop online without assistance. Even for the tech-savvy individuals that were accustomed to online shopping, some products and services were simply too difficult to buy online due to their complexity or nature.

Recognising that in every problem there is an opportunity, is one of BySide's core values and the reason for the birth of our main feature: "Call me back" or Click2Call, as we named it. A simple connection between a form on a website and a phone call, designed to provide an assisted service that links a visitor (online) with an agent in the contact centre (offline).

When Digital Marketing was all about advertising and low-key e-commerce experiences, Click2Call became a revolutionary way for businesses to put the customer first, support sales in the digital channels, increase their digital presence, and convert leads.

60%

Of global sales are assisted sales, mixing offline and online channels

Offline

Online

BySide has grown, but the mission has remained the same. The reason why Click2Call became our flagship product and has stood the test of time is because of the connection between online and offline and because it simply works for both for companies and customers.

Based on these simple concepts, the term "omnichannel" is being thrown around everywhere in the world of Digital Marketing.

Driven by our work with telecoms, banks, insurance companies and major retailers, our product has evolved into a marketing cloud that continually integrates new ways to engage with customers, combining automation and real-time personalization.

In 2019, we closed the cycle by introducing our Contact Centre solution to the market, complementing our existing marketing stack. We believe in business-centric technology, rather than tech-centric business, and our Cloud Contact Centre is the perfect example of that.

1.2. Lead Activation is born

In the early days of Digital Marketing, companies were focused primarily on generating traffic to their digital channels, an effort that gave birth to Lead Generation. In a vicious cycle, most resources and budgets were dedicated to generating more traffic, assuming that more traffic equals more conversions.

As part of the natural growth, new services and functionalities have been added to the Digital Marketing ecosystem ever since. Still, most brands soon face two challenges: the lack of conversion rate improvement and the difficulty to generate insights from all the apps and services providers employed.

Challenges that a single focus on technology wouldn't solve. An opposite mindset was required.

We called it Lead Activation

Lead Activation is the ability to maximise revenue from visitors who are already on your website, app, or landing pages, to focus on lead quality and improved ROI.

Being a customer-centric process, everything starts with knowing the visitor's intentions and behavior. In order to achieve this, the entire journey is covered, and the best-fit engagement channels are presented in real-time to increase the probability of selling.

Simply put, it's the art of focusing on lead quality, achieving faster growth, and higher customer lifetime value.

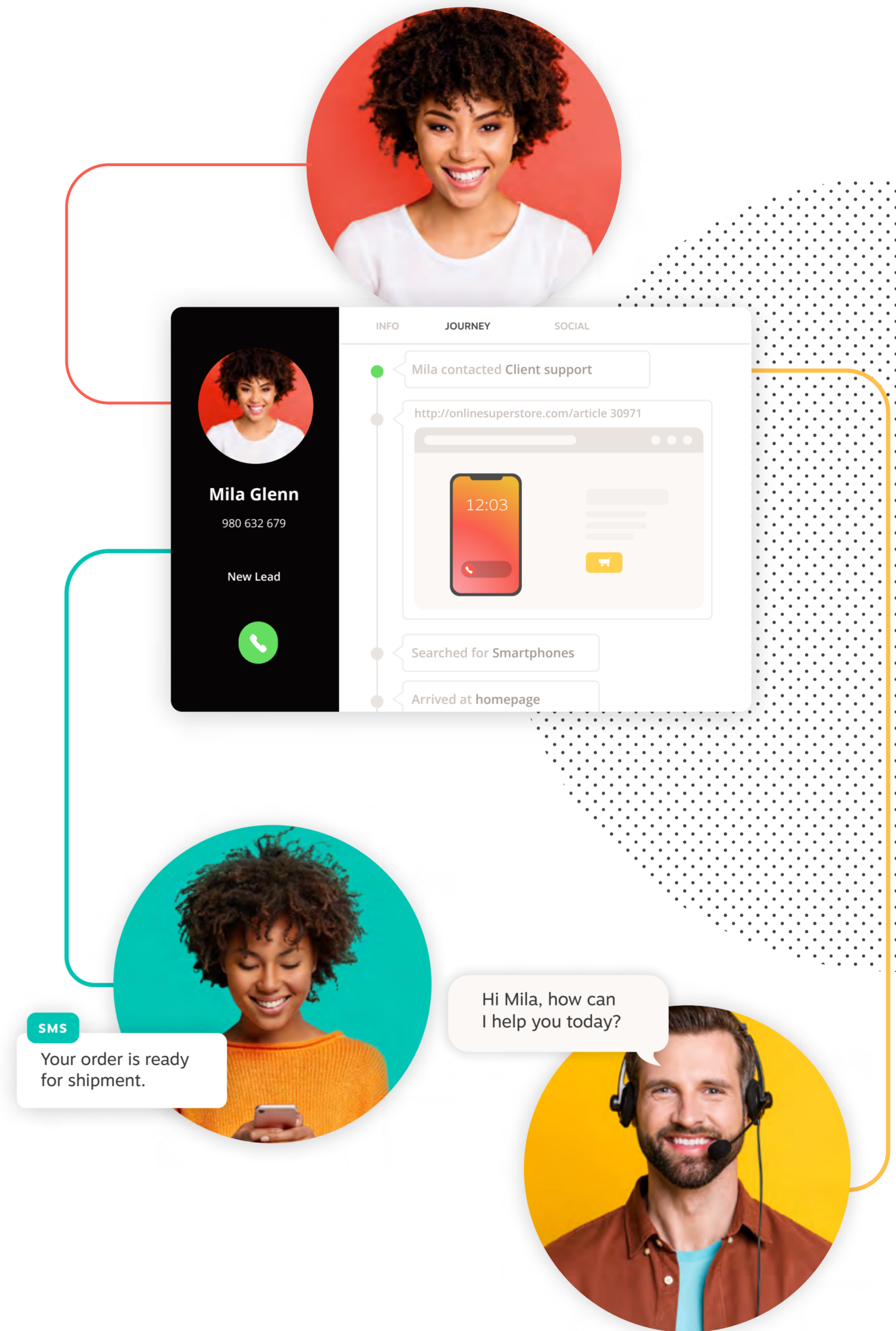# Meet our Lead Activation Hub
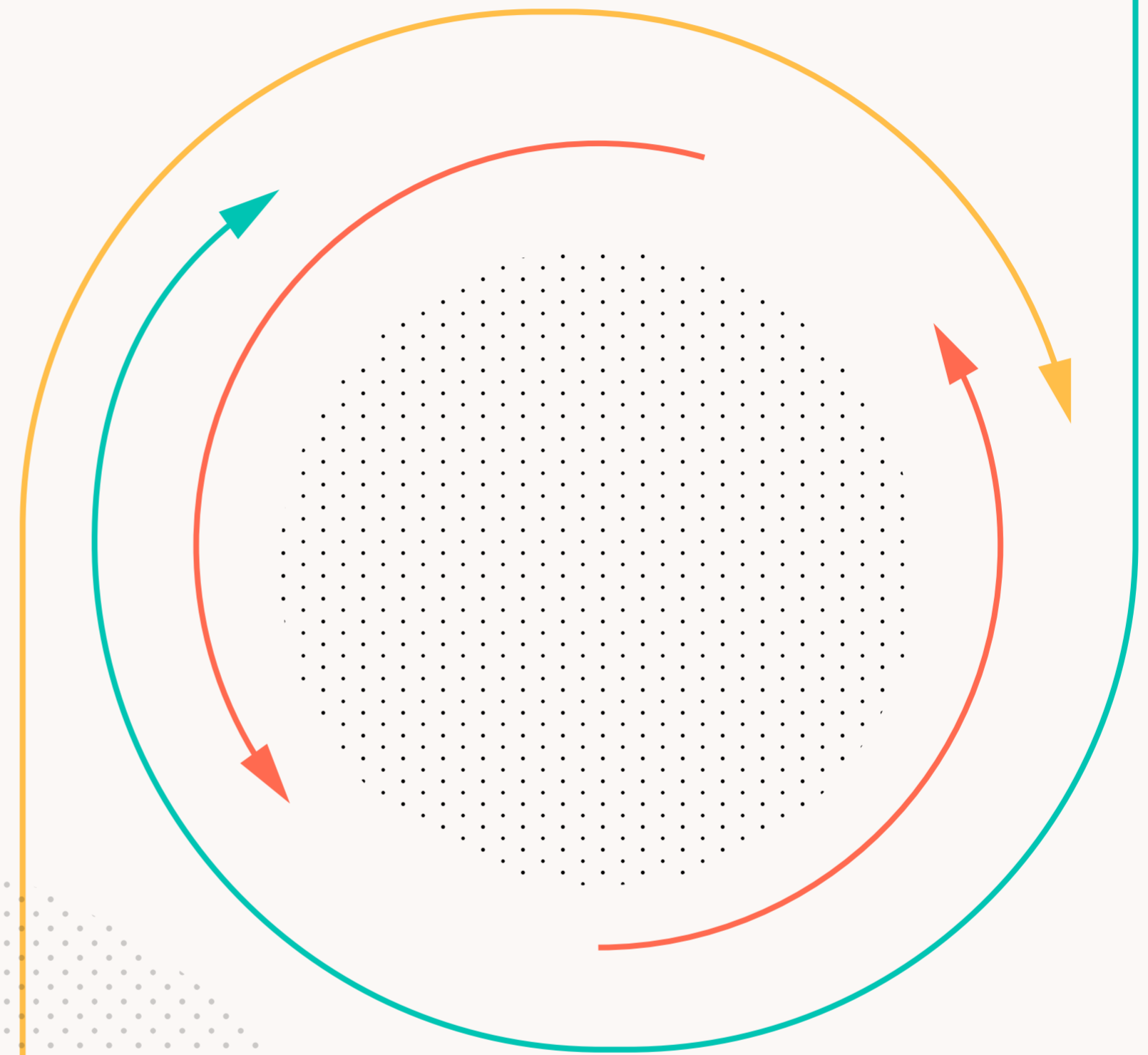
2.1. The Lead Activation Hub

One of the biggest challenges for digital marketers is gathering accurate data from multiple sources.

As a Digital Manager, are you fully aware of the outcome of your campaigns on all channels? Offline and online?

From a different perspective, as a Salesperson, do you fully benefit from customer insights generated by digital marketing tools?

To bridge this gap, remove the barriers between online and offline and support the execution of Lead Activation strategies, there's our platform, the BySide Lead Activation Hub.

Like two sides of the same coin, with a unique combination of Marketing and Customer Experience, our hub is the home to our leading solutions - the Marketing Cloud and the Cloud Contact Centre.

Our Lead Activation Hub is an integrated platform that can connect and orchestrate data from the different solutions you already have in place, while offering new functionalities or improvements for weaker services.

Discover the transforming power of Lead Activation Hub!

What makes the Lead Activation Hub stand out?

It bridges the gap between Marketing, Sales, and Customer Experience.

The Lead Activation Hub

byside marketing cloud

byside cloud contact center

An end-to-end digital marketing toolbox designed with flexibility in mind.

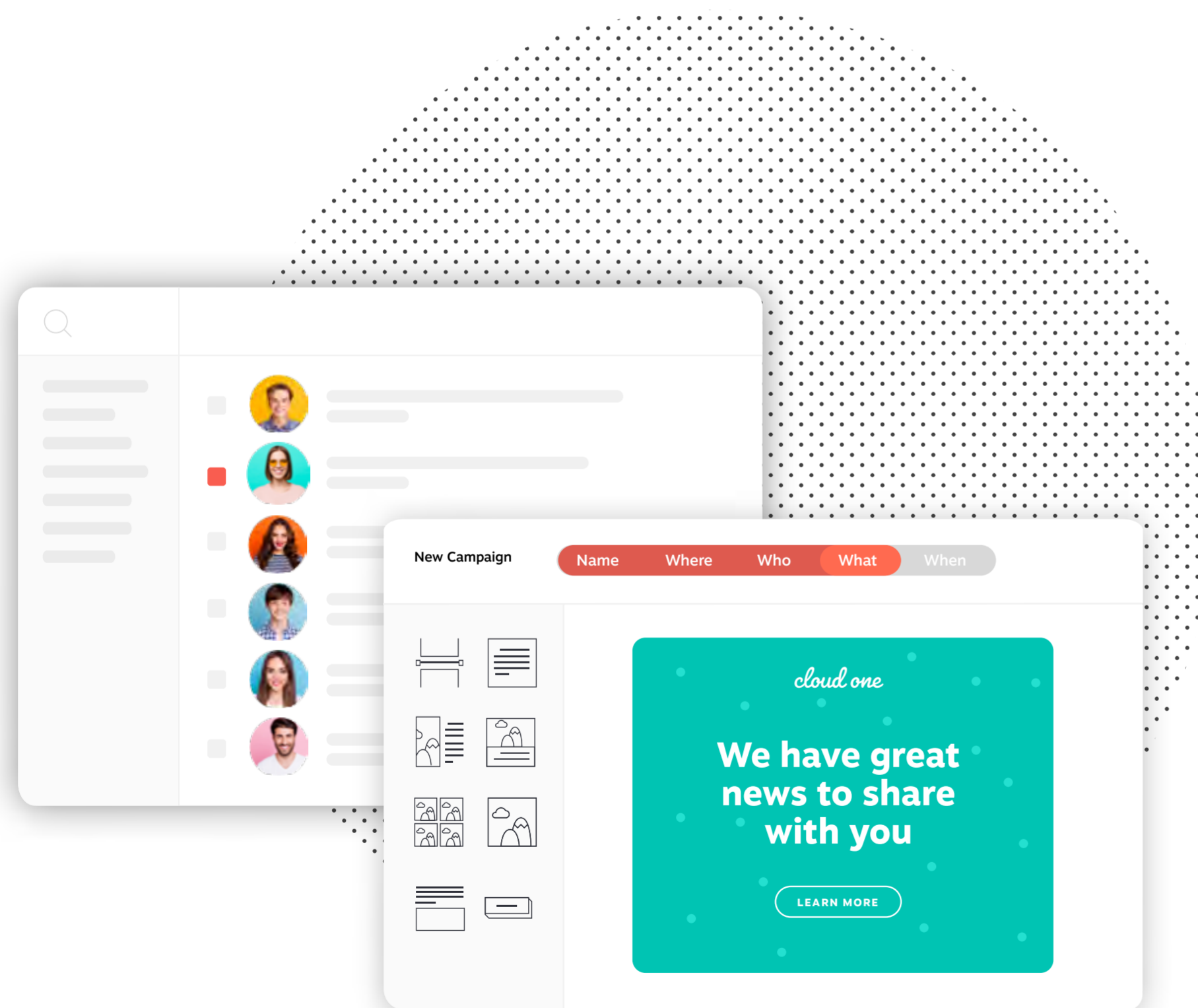A scalable and performance-oriented solution born from the need to unify web and contact centre experiences.

2.2. Marketing Cloud

Marketing Automation and Personalisation solutions, fully integrated with your existing stack. Let's introduce our Marketing Cloud.

A complete solution that can score and qualify leads, build custom audiences, personalise and optimise experiences, apply real marketing automation, fine-tune marketing strategies and guarantee a positive return on investment. Data-driven dashboards display a performance overview of all the key metrics. At the same time, it is also possible to have a more in-depth view of how specific actions are performing.

Our readers with an eye for detail will notice that we were a bit witty about the "real" Marketing Automation. The reason is simple. Often, "Marketing Automation" describes nothing other than a series of automatically sent emails.

The "real" Marketing Automation is about a series of different channels working together, with a clear strategy behind and a single view of the customer. This allows the creation of cross-channel actions to accomplish several goals, such as cart abandonment recovery. In this scenario, where a customer leaves a website without purchasing the items on their shopping cart, a follow-up email can be sent, but also push notifications can be sent, as well as personalisation directly on the website, when the customer returns.

All Marketing Automation strategies aim to achieve higher conversions and sales, and also to continuously improve the digital sales strategy.

What about Personalisation? Personalisation is about delivering highly contextualised campaigns to a specific visitor or audience. This "magic" is created in our Marketing Cloud by profiling audiences based on real-time information collected from multiple touchpoints, without using 3rd party cookies.

In order to make this happen, all customer data is aggregated in a Customer Data Platform (CDP), which purpose is to personalise without compromising user privacy.

Therefore, our CDP allows you to securely store your customer data and create segments that you can leverage across all channels and sessions - including synchronising segments with paid media solutions. This unravels new real-time personalisation opportunities, enabling an exceptional customer experience.

And what about Integrations? We deliver those that grant a bi-directional data sync, create audiences, and send and receive feedback from clients interacting with your offers. Integration over accumulation, that's our motto.

What makes our Marketing Cloud stand out?

An end-to-end digital marketing platform: from customisable dashboards to end-to-end reports, multiple online and offline campaign options, live tracking, personalisation approach, and various integrations with other management systems.

Plus, it's fully integrated with our Cloud Contact Centre solution.
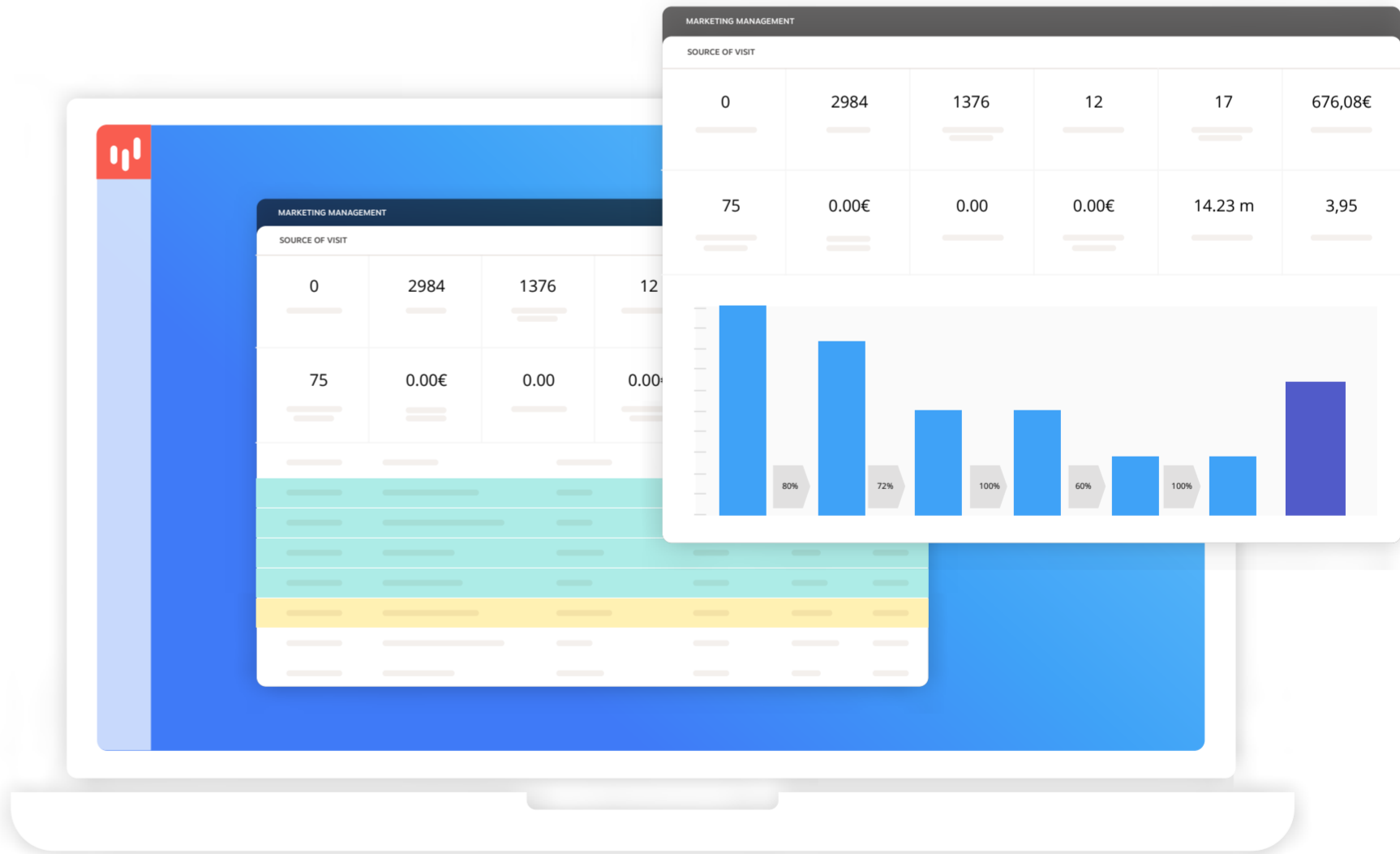
2.3. Cloud Contact Centre

Digital-first Cloud Contact Centre, with voice, video, chat, email, and social, with a focus on connecting digital marketing performance with excellent customer service.

It was born from the need to unify web and contact centre experiences, and enable companies to shape the entire business landscape for the new digital age.

It's about maximising sales and the scalability of management processes.
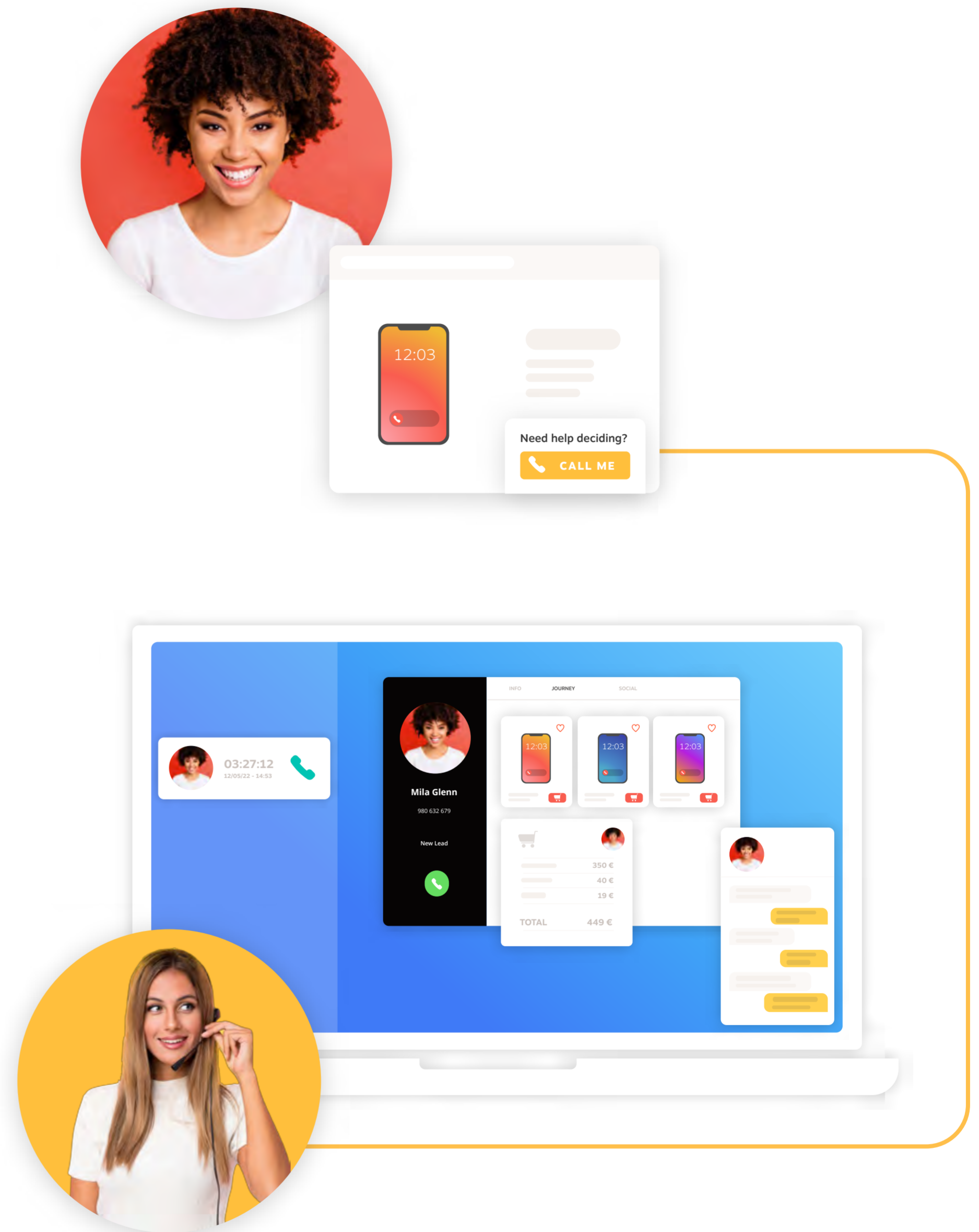
A 360° management solution that allows you to optimise your contact centre processes with live dashboards, monitor teams, and performance, and measure the impact of all campaigns on your sales.

Capable of empowering agents with customer insights, providing access to real-time information - such as customer profile, visitor origin, and items in the shopping cart - which allows them to offer tailored communications, deliver a better experience, and increase sales.

Don't forget our integrated channels, from human-assisted such as Click2Call, Inbound and Outbound Calls, VideoCall, Live Chat, and Messaging App; to fully digital features, such as chatbots. They're all part of our Marketing Cloud and are integrated with our Cloud Contact Centre. This way, the gap between marketing applications and contact centre software is closed.

Adopting a Cloud Contact Centre creates a seamless integration of web and contact centre software, providing a better customer experience, more agent efficiency and improved ROI.
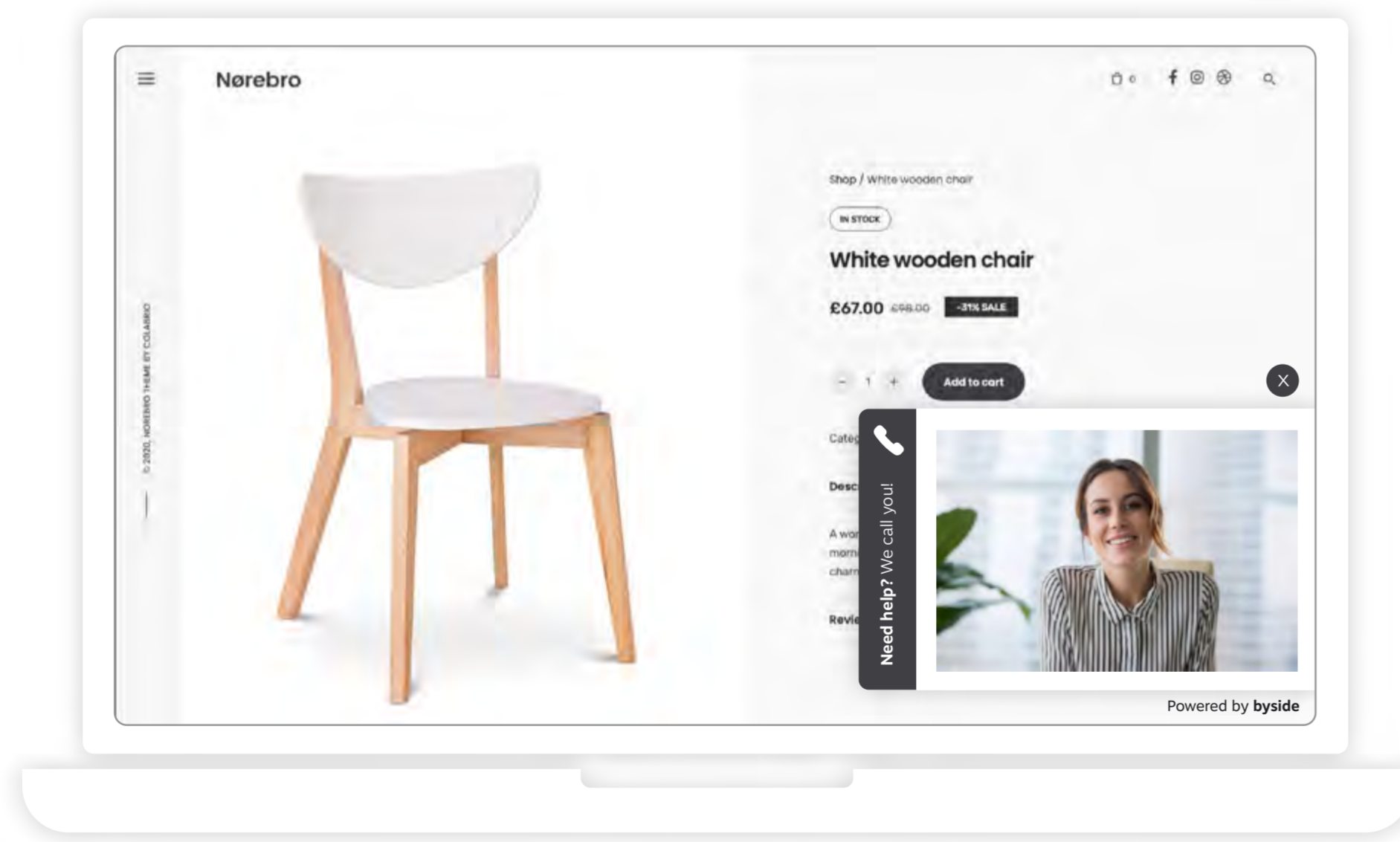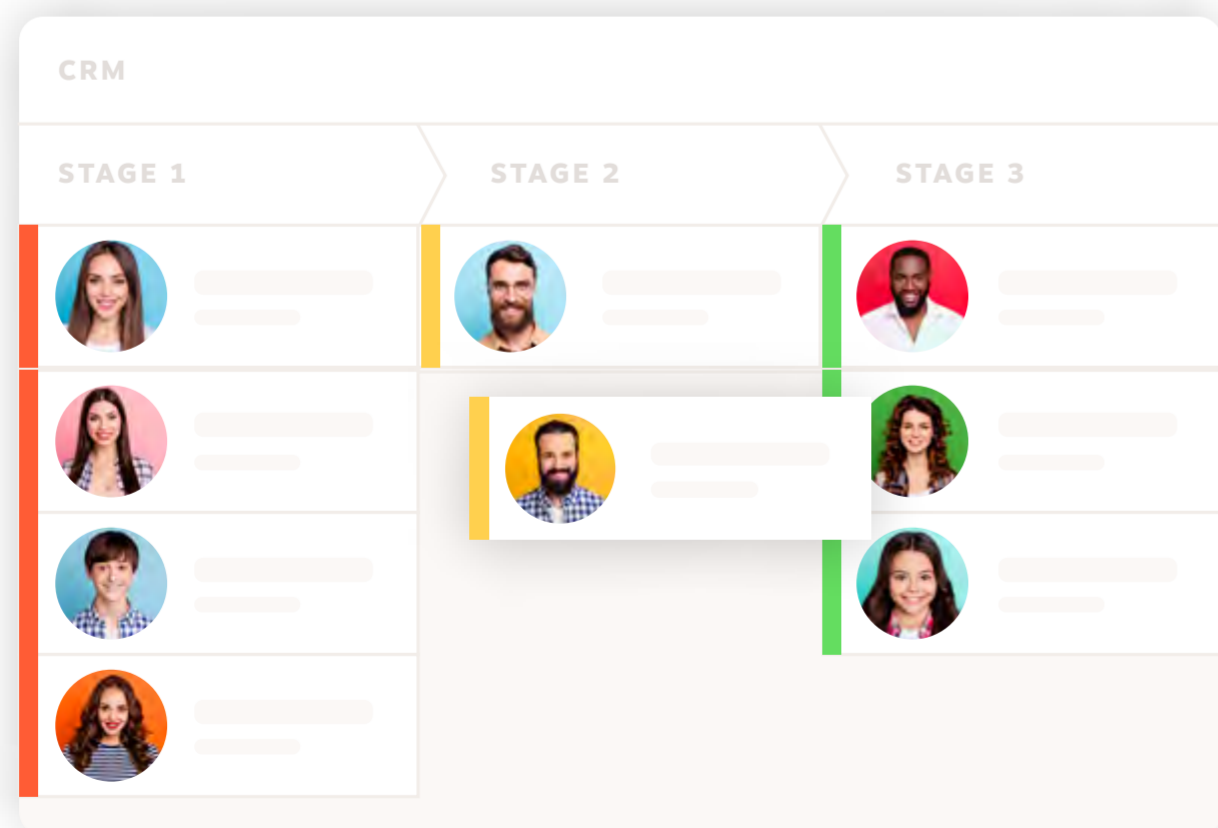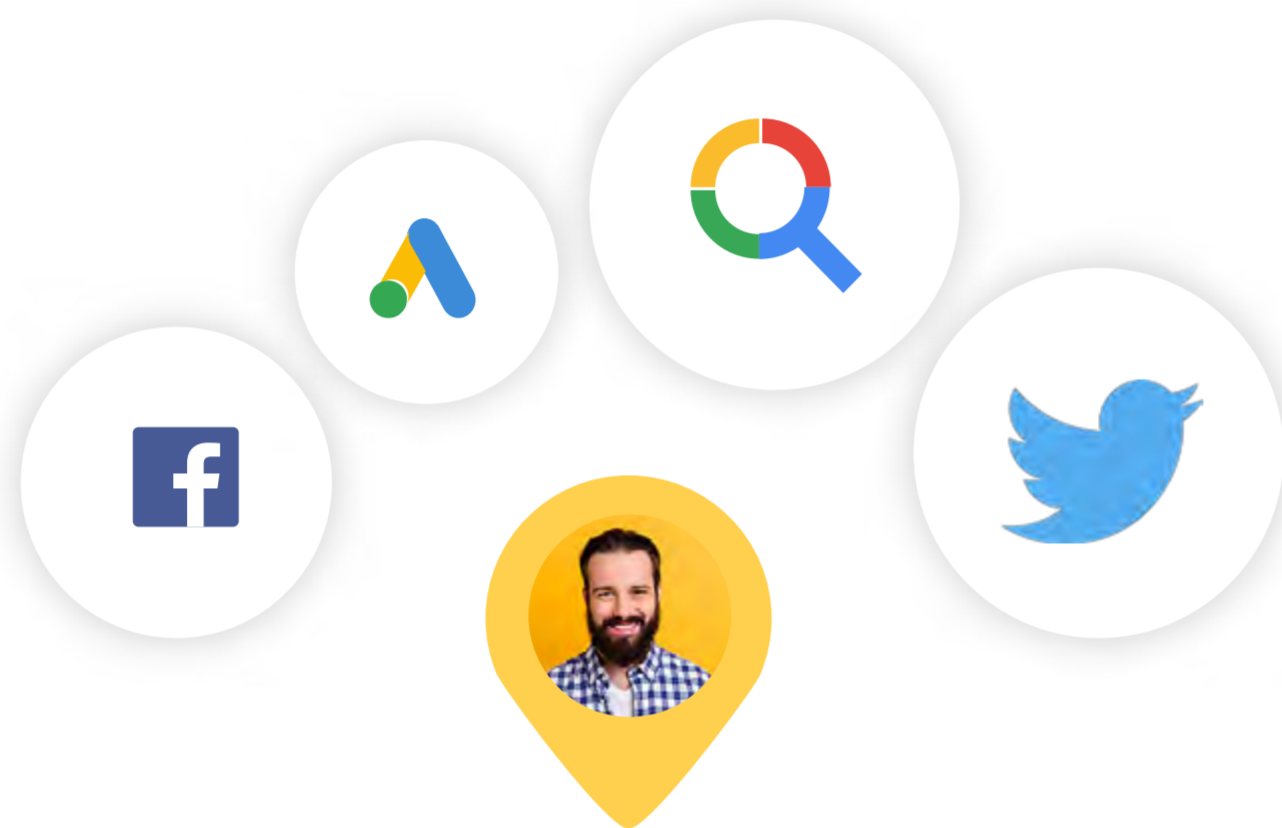
Lead Activation
in practice

3.1. The Lead Activation journey

Now that the concept of Lead Activation is clear, it's time to embark on a journey to achieve better results.

A practical Lead Activation approach is customer-centric and focuses on nurturing leads through a continuous journey. The Lead Activation Journey consists of 6 main steps:

1 - Track

Collect data and understand who your customers are

The first step of any journey is to be prepared. Before venturing into the digital wilderness, it's crucial to gather data and know your visitors: Where are they coming from, what's their intent, is it a regular or a first-time visit? This information and insight populates the visitor attributes to help BySide's Customer Data Platform (CDP) build profiles and target audiences.

2 - Qualify

Score your leads and avoid untapped opportunities

Once we understand the background of your leads, it's time to create qualification processes. Evaluate and score leads in real time and find out which leads are ready for the next stage, which have the highest probability of conversion and which still need nurturing.
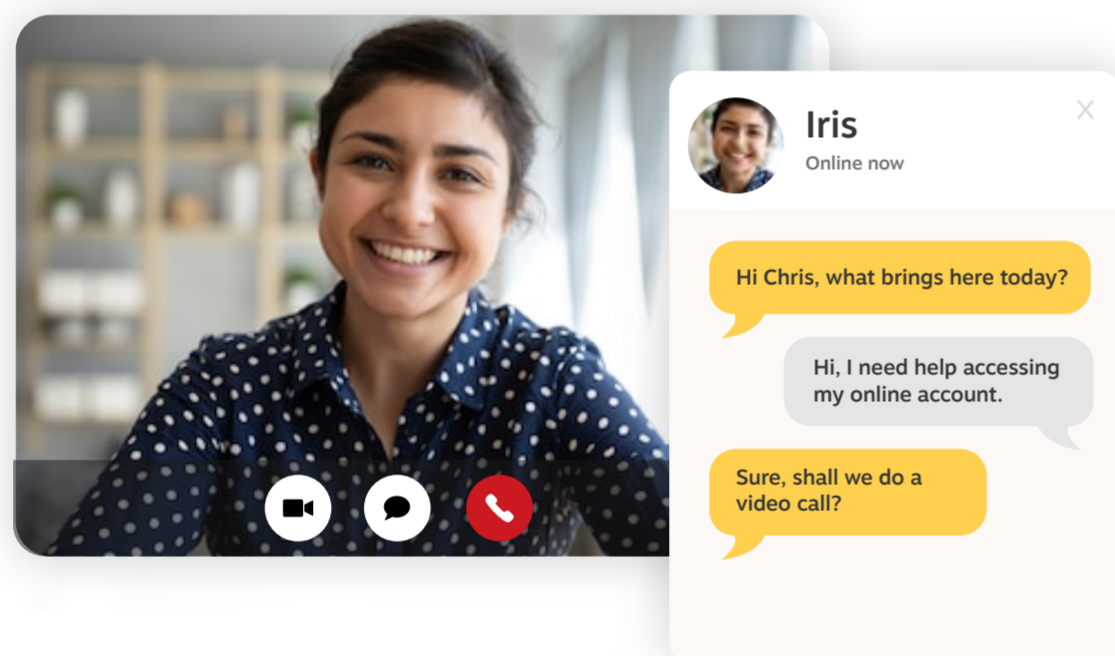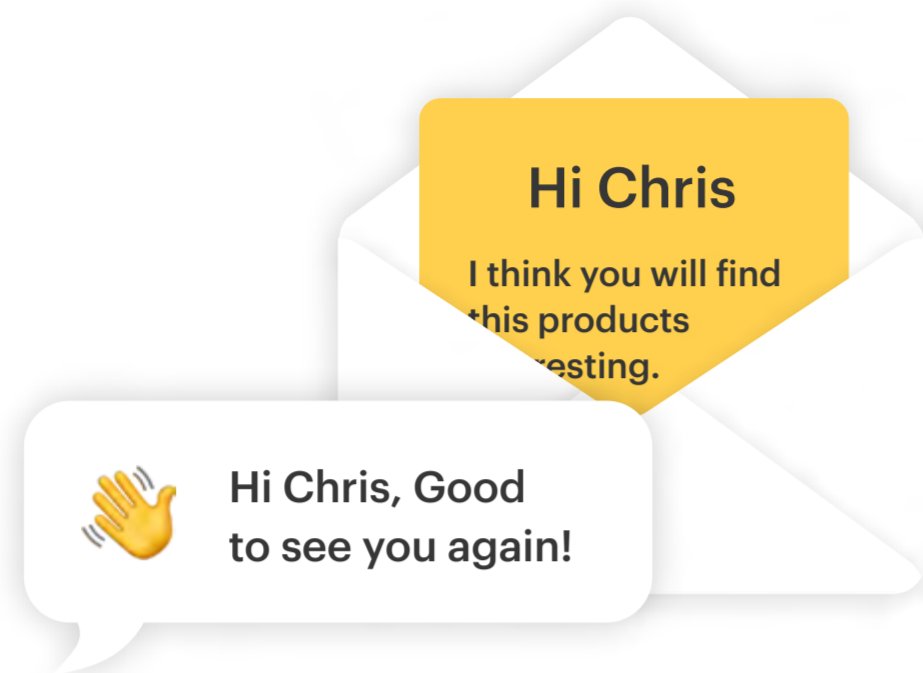
"Companies that add a human touch to digital sales achieve five times more revenue and eight times more operating profit, and increase customer lifetime value and the average order value by 40%."

Source: McKinsey & Company, 2021

3 - Engage

**Create personalised campaigns for better results**

Specific audiences should be targeted with personalised content based on previously gathered information and their level of qualification. This strategy can drive 50% more conversions than using standard content. By tailoring specific touchpoints in real-time, each visitor is presented with the most appropriate offers, increasing the chances of conversion.

4 - Convert

Increase your sales and improve business results

As we mentioned earlier, assisted selling plays an important role in the digital journey. Some customers need to engage with an agent before they can close a deal, while others crave an oriented self-service experience. Therefore, combining meaningful digital interactions with human contact is key for brands looking to retain new digital customers.

With BySide, you can interact with your clients through multiple channels that you can choose based on visitor profile, behavior, and needs.
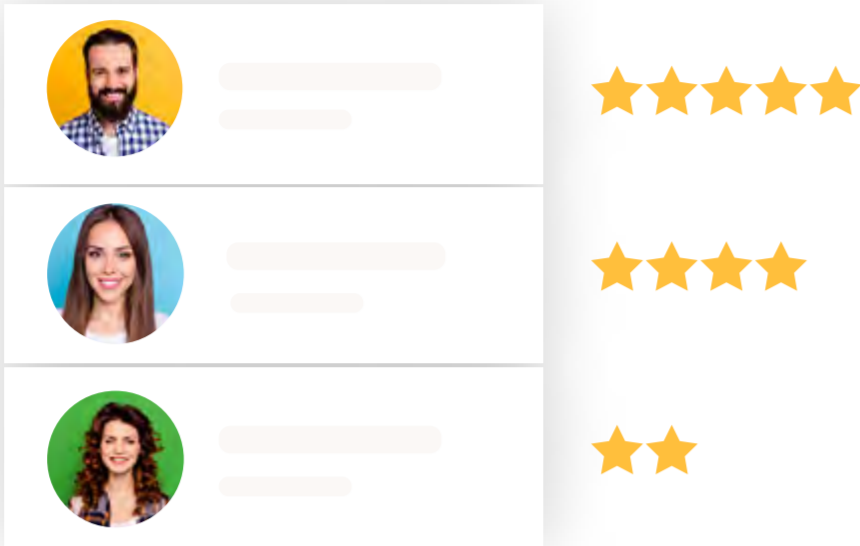
5 - Attribute

**Closing the Lead Generation Gap**

Integrate online and offline conversions in your attribution model, to ensure consistent data flow between different sales and marketing channels. Make sure that you attribute all sales, including assisted sales, to the campaigns that have generated the lead. Only then can you accurately calculate campaign ROI.

6 - Nurture

Increase customer lifetime value and find new opportunities

The cycle does not end once a sale is closed. For those who have not converted, create new opportunities based on the insights you have gathered along the customer journey. And for those who are already customers, figure out what the next best offer is (NBO) and reach out to them with cross-sell or upsell strategies.

The Lead Activation Journey is a continuous loop that enriches customer data with engagement insights and feedback to increase ROI and Customer Lifetime Value (LTV).
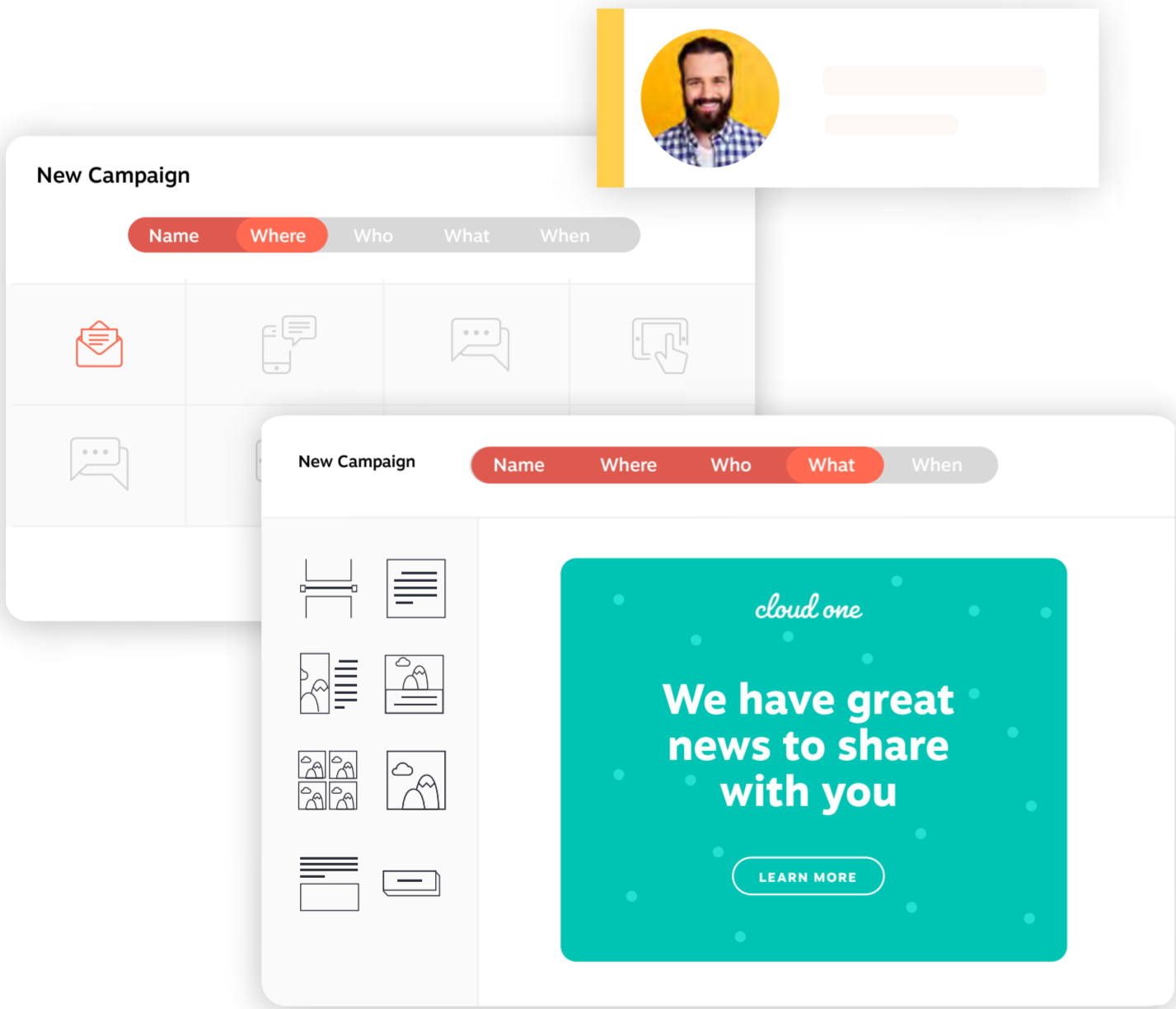
Brands winning with Lead Activation

We are increasing conversion rates for corporate brands
in Telecommunications, Banking, Insurance, Utilities,
and Retail across 21 countries.

Lead Activation
by industry

Over the past decade, we have worked with companies in more than 21 countries and various industries to use our experience to improve conversion rates and customer success.

IN PRACTICE

Initiatives to increase Visit to Lead ratios

✔ Contact forms triggered by user inactivity and abandonment intention in the subscription funnel

✔ Segment-based content personalisation

✔ "Can we help" widget with an Assisted Sales configurator for telecoms

✔ Click2Call within mobile apps

Telecom and Utility services

BySide helps Telecom and Utilities industry leaders to streamline their communications on a person-to-person level. We provide the data to better understand their clients and enable personalised offers and customer support.

By having a clear view of a client's profiles - product preferences, previous purchases, and preferred channels of communication - we can tailor campaigns and align digital efforts to match visitors expectations, while increasing satisfaction and the chances of more sales.

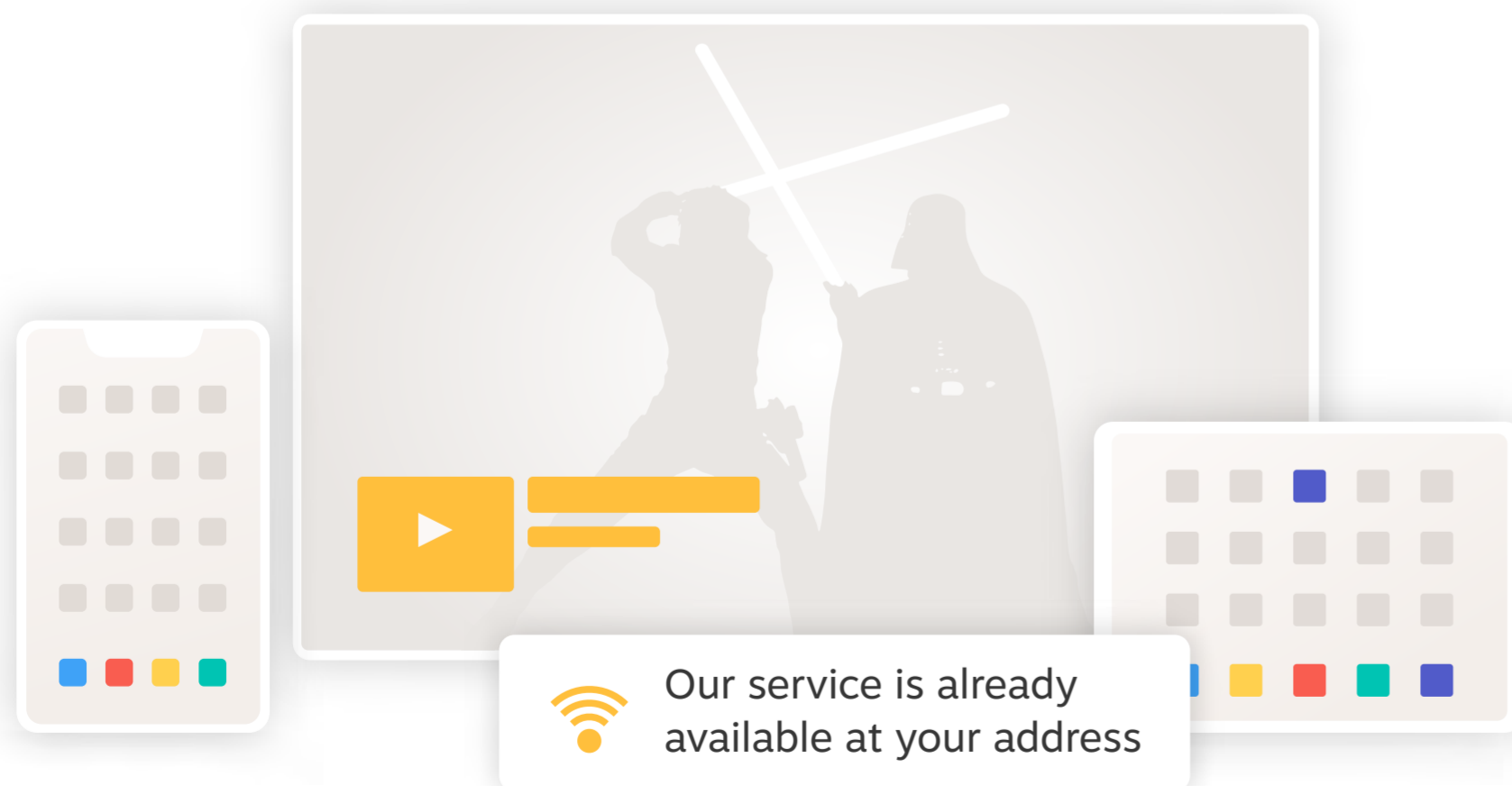**Customer Service is the new battlefield in digital sales. Companies must provide high-quality human-level support without sacrificing efficiency.**

Global challenges

✔ **Accelerate sales**
✔ **Personalised customer's journey**
✔ **All insights in one place**

Our service is already available at your address

Retail

Bringing the online and the offline together with the Lead Activation journey.

Consider the following scenario: a client visits a physical store and buys a desk. Wouldn't it be nice if the next time that client visits the store's website, the homepage displays a promo discount on office appliances and chairs? That is an excellent example of well targeted communications that could also happen outside the website and applied to SMS and Email campaigns, or any other communication channel.

This is how you can combine omnichannel communications with personalisation. But it can go a bit further since it is possible to track offline sales and automatically attribute these sales on your platform, setting a thank you note to be automatically sent to the client's email.

Retail is a complex environment where the online and offline worlds often overlap. This makes it difficult to coordinate campaigns and have a clear overview of the customer journey. With BySide, both worlds are integrated into a single platform with real-time reporting, so you never lose track of your campaign's performance.

Global challenges

✔ **Personalise multiple touchpoints**

✔ **Accurate attribution of all your sales**

✔ **Integrate the digital world with your in-store experience**
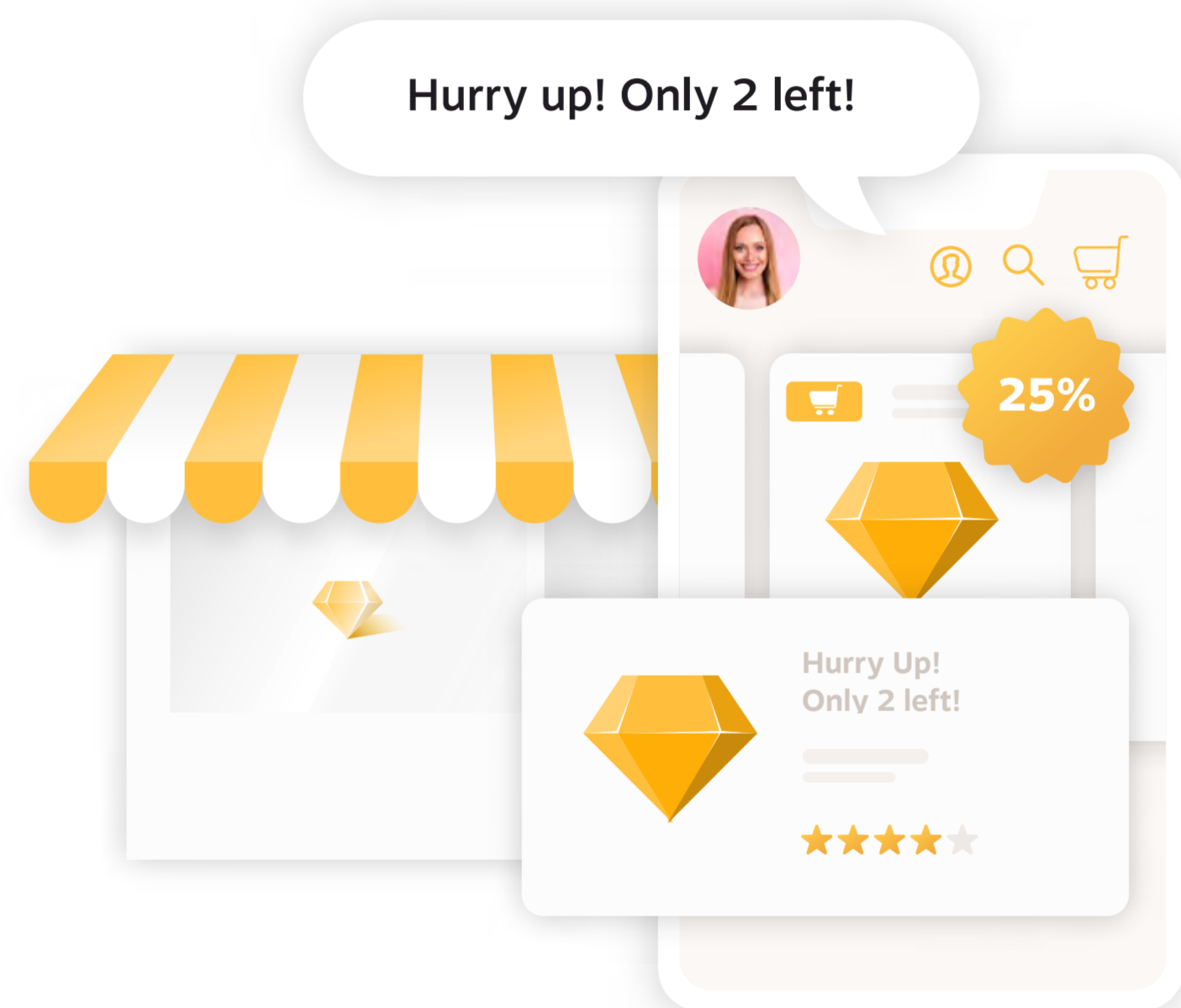
"91% of customers are more likely to buy from brands that target them with personalised content and relevant offers, based on previously gathered information and their qualification level."

Source: Accenture, 2021

IN PRACTICE

Improvements in Lead to Sale ratios

We register an average improvement of 75%

✔ Use of Click2Call in most CTAs for faster connection times

✔ Media optimisation based on contact results (eg. exclude customers with low credit scores)

✔ Giving more contextual information to contact centre agents - products that have been previously selected by the customer

✔ Continuous CTA A/B Testing to generate more qualified leads

There's a new credit solution that you may be interested in
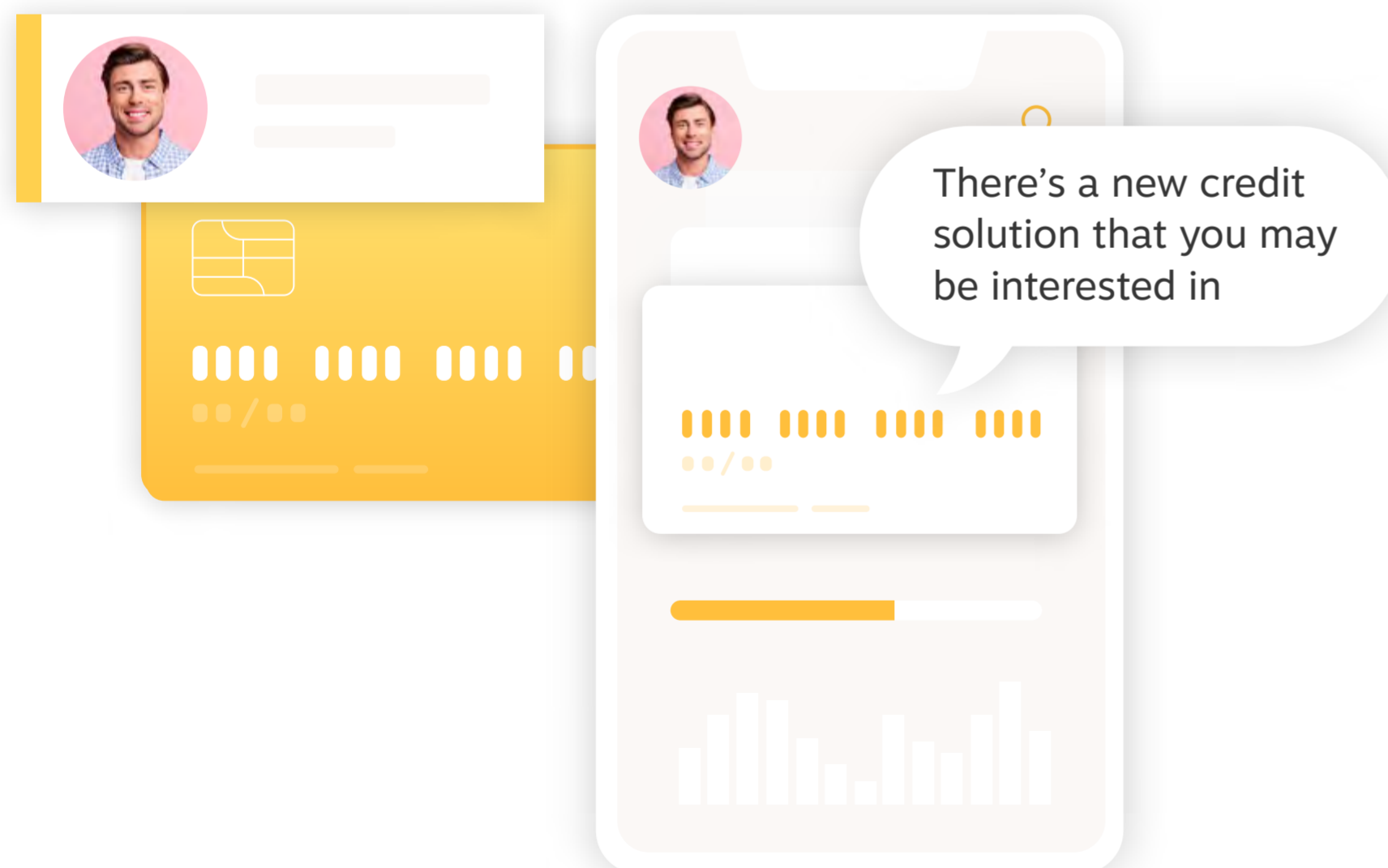
Banking and Finance

BySide's trusted solutions help Banks and Financial companies develop closer relationships and exceed clients' expectations, with a strong focus on acquisition and retention, while connecting sales to digital campaigns.
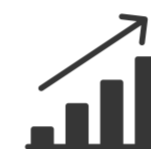
Retail Banking

"Retail Banking" refers to the banks with street agencies that we all use as individual clients and often visit. Our Lead Activation solutions allow banks to interact with their clients through their preferred channels online, over the phone, or in person. Customised offers and communications enable us to create a cohesive and personalised experience between home banking, customer support, and physical agency.

Corporate Banking

The most important factor is the integration of both solutions, the Marketing Cloud and the Cloud Contact Centre, to provide the bank's agencies and contact centre operators with accurate insights into each clients' status, preferences, and corporate profiles. By tailoring a unique customer experience to each corporate client, it is possible to overcome the clients' best expectations through segmented offers and highly contextualised interactions across all channels.

Insurance

With Lead Activation, insurance companies can transition and adapt to the new digital trend, which includes hybrid working among many other challenges, while ensuring full protection of all their data. The combination of marketing applications and the Cloud Contact Centre ensures that a high level of service can be maintained and deliver a seamless experience for both clients and agents, streamline sales and improve customer satisfaction.

Global challenges

✔ **Personalised customer journey**
✔ **All the insights you need in one place**
✔ **Connecting sales to digital campaigns**

IN PRACTICE

Improvements in Contact Center Productivity

We register an average reduction of 3,2% in abandonment rates. This is mostly due to queue prioritisation based on Lead Scoring.

Automated abandonment recovery workflows - using our marketing automation feature - generate an average increase of 7% in sales.

Good news Chloé! We found the best deal for you! Login to learn more.
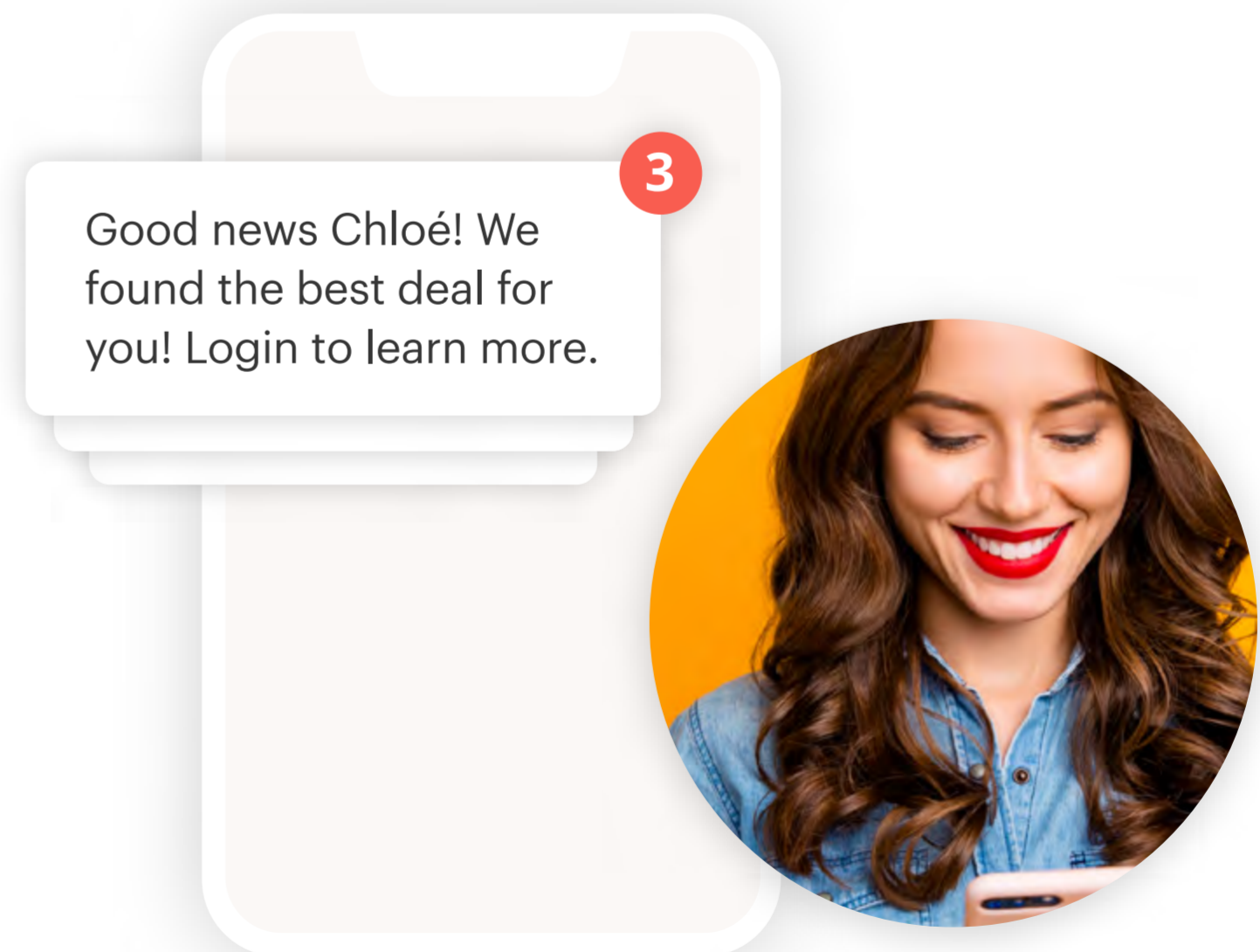
One last word and proposal

After years of revolutionary ideas and hard work with global brands, we are proud to say that we have created a unique combination of Marketing, Sales and CX platform with a service that significantly impacts our clients' business results.

We hope you may be curious to understand how your company is positioned in terms of digital sophistication and Lead Activation.
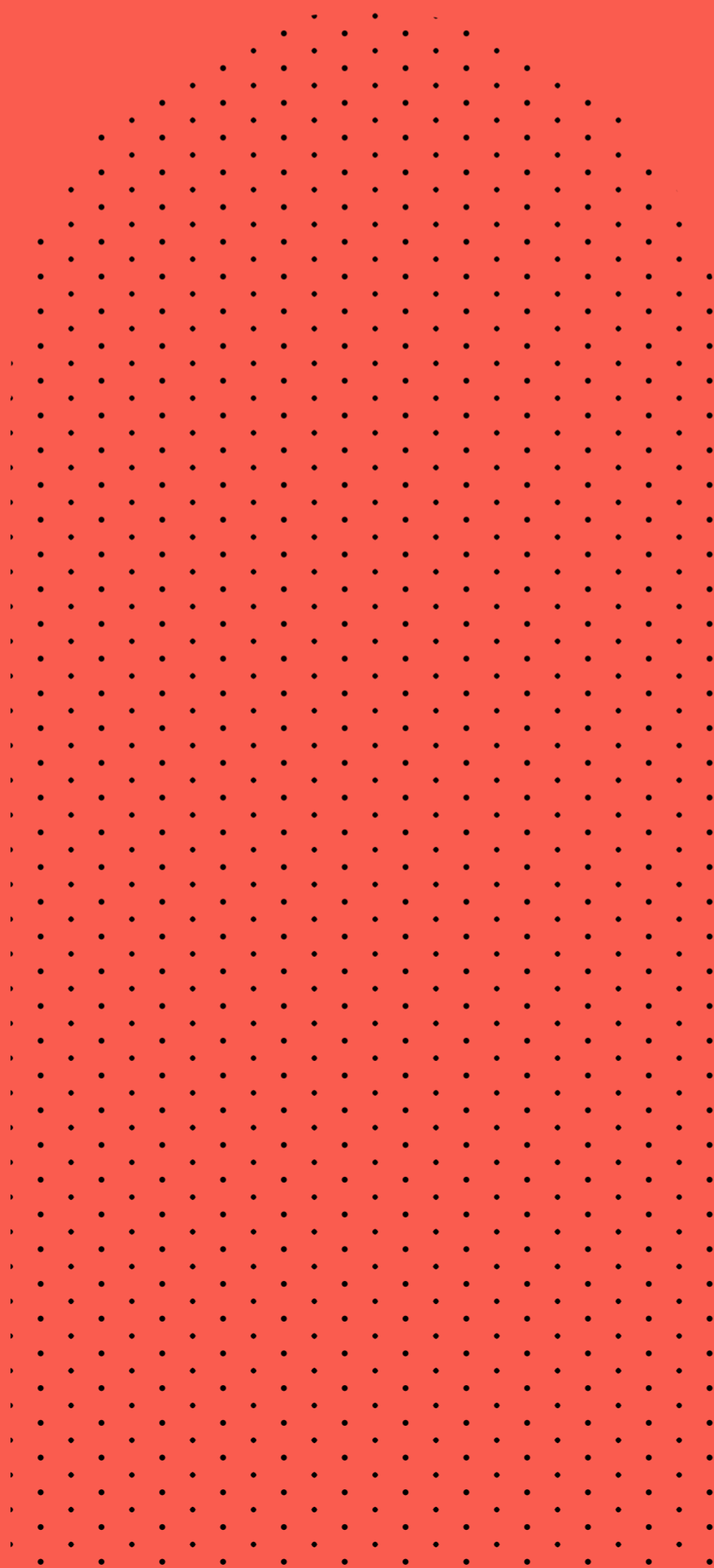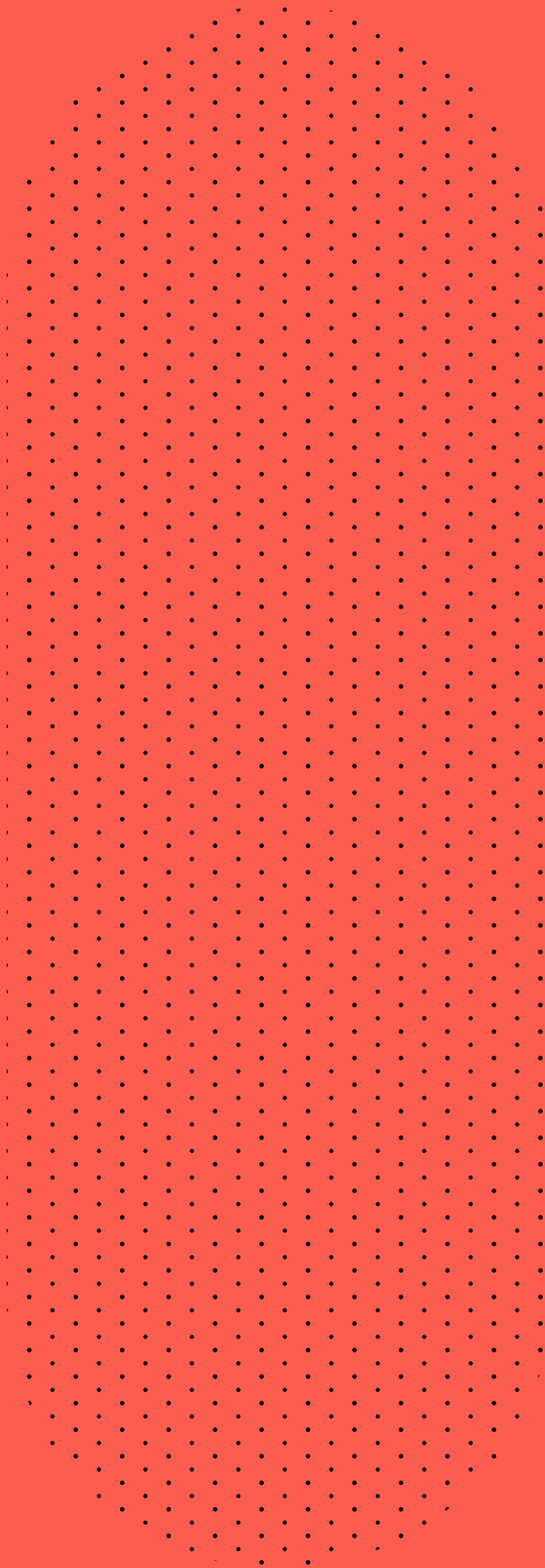
Answer our survey to find out where you stand and get a full report with insights on how we help companies with the same challenges as yours.

We look forward to finding you in this fast-growing digital business landscape.

Start survey*

* This exercise is private, and no information will be shared with third parties.
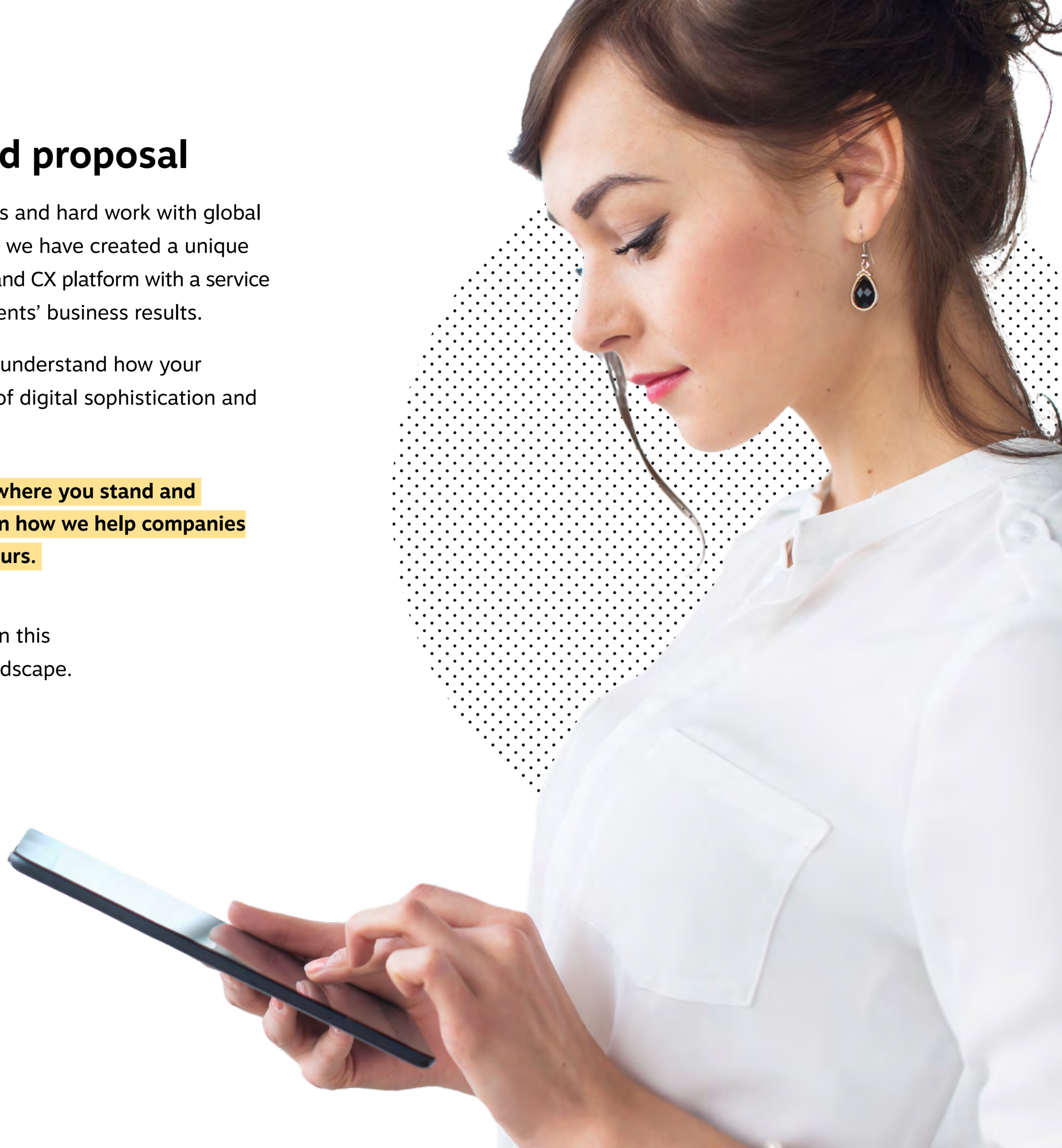
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