THE ONLINE/OFFLINE GAP IN LEAD MANAGEMENT PROCESS

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Introduction

Current marketplace is shaped by a bundle of factors which form a constant pressure on companies even in the sectors which until recently were a classic example of producer market. These factors are i.e. globalization, deregulation, spread of internet use in growing number of forms and financial crisis which started 2008 and is still overshadowing world economy. In reaction to market requirements companies make review of all aspects of their activities including marketing strategies. Where it is possible, one can observe retreat from traditional (classic) marketing with its mass character or segmentation based on general criteria, to new era of relations between company and customer in one-to-one marketing [Gordon, 2001, pp. 123-124] or even one-through-one marketing [Gordon, 2013, pp. 109-110]. Growing role of customers treated by a company as partners is a foundation of Customer Relationship Management (CRM). In this context, one of most important issues is proper use of customer data obtained online in offline sales channels which in most industries are still irreplaceable.

Sharing customer insights and transferring data from non-transactional to transactional points of contact is domain of lead management (LM), which is basic CRM process [Deszczyński, 2005, p. 389]. The aim of this paper is to identify competence levels in managing customer relations through different channels in complex sales organizations. In particular emphasis is laid on showing how lead management is supported on the example of automotive industry and to what extend management of customer dialogue in the initial phase of relationship should be improved. The problem is depicted upon literature review supplemented by results of two-stage research project examining lead management at local dealer level and from the perspective of cooperation between dealer and respective national sales company.

Lead management is an acquisition process also known as opportunity management [Baran, Galka, 2014, pp. 201-202] aimed in systematic registration and processing of information about customer interest in company offer [Deszczyński, 2013, p. 25]. Given the

fact LM is the nearest CRM process to sales and therefore most tangible link between customer care and calculable financial results, one can propose a thesis proficiency in LM can act as indicator of overall capabilities of a company to implement relationship management.

LM can be also defined as consolidation, qualification and prioritization of contacts with prospect buyers [Salomann et al., 2006, p. 26]. The objective is to provide sales persons with a list of qualified and prioritized valuable prospect buyers, who can be contacted within offer management process [Bueren et al., 2004, p. 4]. It is estimated that i.e. for Audi brand only in German market, leads generated in the internet are reflected on average in more than 40,000 car orders annually [Deszczyński, 2013, p. 25]. Other study shows that again in case of Audi brand, 30% of qualified top priority leads result in 51% of Audi sales, and 27% of them generate sales within 90 days from enquiry [Sauberlich et al., 2005, p. 299]. Thus successful LM strategy can bring direct results in additional turnover [Rigby, Kedingham, 2004, p. 5]. However it does not mean companies are utilizing this potential properly. A commercial study of Indidesales.com and Incoho.com showed that 47% of companies respond to online enquiries by e-mail, 7.5% by phone and 45.1% ignore them completely [Omniture, 2008]. Moreover, other sources indicate companies are loosing up to 71% of online leads what can be attributed to slow response time for the enquiries, which is calculated in average for more than 46 hours [Forbes, 2012]. Meanwhile behavioral studies aimed in determining success in calling web-generated leads based on over fifteen-thousand-calls-strong database showed that the odds of contacting lead in five minutes versus thirty minutes fall hundredfold [*The Lead Response ...*, 2007].

The recalled studies cast some light on the issue of LM but they are limited in number and in research methodology. While it is reasonable to measure initial response time and overall success rate, this study aims in examining the performance of the whole LM process from the first enquiry to personal and follow-up contacts. In this context use of multiple communication channels enforces communication process maturity which many companies can be lacking and therefore may not be successful with LM even if responding promptly to enquiries [Ramos et al., 2009]. Defining sales ready leads, nurturing them, scoring and automating which is the essence of LM [*Lead Management ...*] can be a difficult challenge especially for multi level sales organizations such as in automotive industry. With four different contact points and process stages (online, phone, personal and follow-up after personal contact) this study integrates LM with offer management/sales management and is focused on collaboration of different employee groups building the frontline of customer care and sales organizations as well as their back office support. Their performance is measured on every process stage upon time accuracy of contacts, range of information provided, customer data sharing and proactivity. Analyzing the competence of maintaining coherent dialogue with the customer through different channels supported by people and technology across several company functions, may reveal more on its performance and roots of competitiveness derived from relationship assets than fractional studies. Therefore key takeaway for competent managers resulting from this research is that LM as one of CRM processes, can only be successful if balance between strategy, ICT and organizational alignment is guaranteed [Hart, 2006, pp. 17-18]. Hence concrete scenarios of loss of valuable prospect buyers can be examined with the aim of leveraging effectiveness of LM especially starting online by embedding it in overall communication and offering process.

Literature review

The essence of LM is providing prospect buyers with useful information and solutions in the right place and time. It can take form of prompt reaction to submitted requests or proactive additional needs creating proposal based on customer knowledge. Even if traditionally so called hot leads (customers determined to buy immediately) were perceived as most valuable [Sauberlich et al., 2005, p. 291], LM has to be perceived in broader perspective, as an initial CRM process [Bueren et al., 2005, p. 579; Rigby, Ledingham, 2004, p. 5]. In this context LM is aimed in feeding company's pipeline with prospects who will eventually become loyal customers what seems to be particularly important since customer churn accounts in average 20%-40% annually [Baran, Galka, 2013, pp. 239-240].

Unlike other CRM processes, the evaluation of LM efficiency may be performed in relatively short time without necessity of waiting until the full cycle of product re-purchase completes. It seems that basic factors of LM success are the following elements [Deszczyński, 2012, p. 6]:

- employee competences,
- fighting customer anonymity,
- data integration,
- convenient services delivery,
- dialogue using benefits language.

Employee competences are the basic requirement for doing business everywhere. Their importance for company success is well-known i.e. for all followers of Resource Based View [Hamel, 2002; Pyka, Brzóska, 2010]. In the LM context this applies to every single employee group having contact with the customer. Professional salespersons have to rely on professional customer contact center team. In other case they will not receive any qualified leads increasing the set of information collected about customers contacting directly sales office or showroom. On the other hand professional online dialogue without continuity in offline channels may form an expectation gap which

will only damage brand encounter in the whole process [Mundie, Cottam, 1993, pp. 80–81; Christopher et al., 1996, pp. 68–89]. Therefore well organized LM process will transfer customer from the initial point of contact to the stage where customer needs can be addressed [McGinnis, McCarty, 1998]. Especially LM online services are in place to accelerate the movement of leads to most appropriate points of contact and enable better tracking and follow-up of lead opportunities.

Fighting customer anonymity means replacing one-way information flow (organization → customer) with dialogue (organization ↔ customer). The chance for success grows with the grade of offer individuality and time accuracy. It is however hard to explore customer needs profile with one phone call, e-mail exchange or even personal contact. This is particularly true if significant portion of these contacts is held in anonymous 'customer question – simple answer' manner (indifferent if customer is completely not traceable or data registration procedure is lacking). In addition integrated, gradual data build-on approach has to be implemented what requires coordination of multi channel communications and seamless data sharing process [Payne, Frow, 2013, p. 309].

Data integration is usually supported by appropriate ICT tools which (especially in bigger organizations) can be a great help [Payne, Frow, 2013, pp. 327-328], but again human factor is the most decisive one, especially at the cut-points of online and offline communication channels. Therefore even connecting every point of contact to one ICT system does not guarantee that knowledge which was obtained in initial stages of contact will be fully utilized later on.

The ability to deliver services in an convenient way requires empowering employees at every point it is reasonable. A good example of that can be an employee of after-sales customer contact center in automotive industry. Arranging a service visit for a customer seems to be natural next step after providing basic information on the phone call, via e-mail or in tweeter conversation. This seems to go in line with trends in customer expectations, such as "each time you do something for me, do it better than the last time" [Gordon, 2013, pp. 37–38]. If it is not the case, justification – benefit for customer to share more information on specific needs is also not in place. In turn organization loses control over the way customer goes from information collecting phase to buying decision.

A dialogue using benefit language is basis for building long-term relationships. Lack of mutual benefits balance weakens customer-company bonds and goes in line with traditional, transactional model of doing business [Deszczyński, 2011, p. 22]. Dialogue using benefits language is also technique of conversation, negotiation with customer, assuming active listening and stressing those aspects of the offer which with the highest probability should be interesting for him. Only by doing this, contacts with the company/brand will be perceived by the customers in terms of "personal high utility", i.e. by giving a concrete piece of advice which helps them in solving individual problems. This transfers objective, rational offer examining more in the realms of subjective, emotional decisions [Mruk et al., 2007, p. 15].

Research methodology

The theoretical discussion on effective LM process is supplemented in this article with the results of a research carried out in automotive industry. Its main purpose is to illustrate to what extend effective LM in multi channel environment can be observed in business practice and where are possible limitations in implementation of integrated communication process.

LM in automotive industry seems to be ideal example of multistage and multi channel process. It is supported by various levels of actors: producer/brand owner, national sales companies (NSC), dealers or regional dealer groups and external services providers as usually customer contact centers are outsourced [McGovern, Quelch, 2005, s. 1]. It almost always involves initial online or impersonal contacts mixed with offline/personal contacts in showrooms, during test drives or special events. A recent American study shows that 91.4% of car purchases start with research done online and 82.5% of potential buyers will submit a request by phone or e-mail before visiting showroom [Krogue, 2014]. Therefore the existence or inexistence of seamless LM process can be treated as good piece of evidence of corporate excellency in terms of managing people, processes and ICT tools.

The research was carried out in two steps. In the first step research sample consisted of 55 dealers from Poznań area (Poland) representing several dozen brands (beginning with popular ones such as Fiat, to end with premium ones such as Mercedes-Benz or niche like Subaru). Nine mystery clients were asked to start LM process and continue contacts in sales process with 5-6 dealers of different brands. The research design provided approx. two weeks of contacts in four stages, as follows:
- online information request,
- telephone information request,
- showroom visit,
- follow-up contacts.

Research participants were asked to give their contact data freely. In addition they were to repeat the same questions and express the same interests during two initial stages of contacts so that the salesperson (step three: showroom visit) had a chance to work on information gathered earlier in the process. Questions were divided into simple and advanced ones. The simple ones were dealing with prices and promotions. The advanced ones were designed to involve not just the front office personnel but also back office. I.e. in stage four: follow-up contact, financing offer was required and detailed technical question was asked. Table 1 contains question highlights in relation to four subsequent research stages.

To determine the level of cooperation between the NSCs and their dealers, a second complementary study was started. Mystery clients were to download an on-line car brochure and apply for a test drive. Again they were asked to give their contact data freely and express interest in buying a car. This part of research involved examining lead mobilizing strategies after brochure download and the ease of remote arrangement of real contact at the dealer premises. This time enquiries were more geographically spread out starting with the city of Poznań but also involving dealers from smaller cities in Wielkopolska (Greater Poland area). Finally as much as 109 LM processes were started and examined mainly in the period of June and July 2013 with some late contacts reaching up to a couple of months after the main research phase was finished.

General results

The research results, as indicated in Figure 1 show that in general the best performance can be expected as the customer enters the showroom in person. This is no wonder, as customer reception process at dealer premises has always been of paramount importance for the automotive industry. Expensive show-rooms, POS materials, hundreds of thousands invested in show – and test drive cars and ongoing training and motivation programs for salespersons and their principals, have made it possible to achieve in average 68% of standards conformity. Hotline contacts were ranked second (62%), while online process was ranked third with only 45% of standards conformity and follow-up fourth with disastrous 39%. The gap between contact in the showroom and online enquiries of 23% indicates problems in initial phase of lead management which (as the detailed results of this study will show) cost companies lot of efforts in filling leaking sales pipelines.

Additional key findings resulting from the research are that there is no single brand domination. Among 15 top ranked dealers, every single one represents different brand. What is even more interesting neither brand nor particular multi-dealer organization guarantee performance at comparable level. In most evident cases, the difference between the best and worst dealer reached 50% (Opel) and 42% (Mitsubishi). Within the same multi-dealer organisation top or good performance was possible accompanied by poor performance delivered in other brands represented by the same entity (common difference up to 40, 50 or even 60% as in particular case of Chrysler and Mazda dealer).

Table 1. Question highlights

Standard evaluated	Channel			
	Online	Hotline	Showroom	Follow-up*
Simple pricelist enquiry	•	•		
Car configuration feedback	•	•		
Back office involving enquiry	•	•		
Pro-active customer contact enquiry	•	•	•	
Fast contact enquiry (i.e. chat or call-to-action)	•			
Use of key buying driver		•	•	
Test drive proposal		•	•	
Offer proposal		•	•	
Customer identification with key buying driver used in contact		•	•	
Follow-up (if done)				•
Range of written offer				•
Additional equipment enquiry				•
Solution for customer objectives				•

* Follow-up = e-mail or phone call
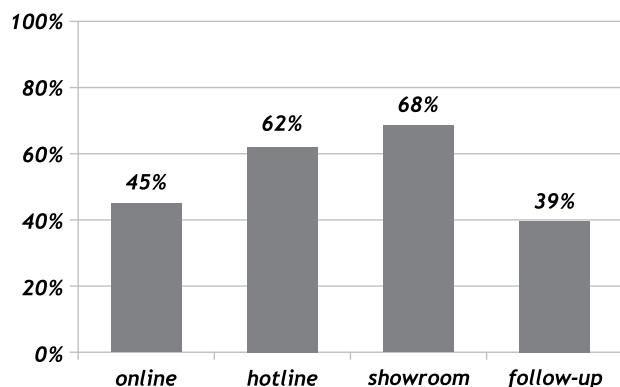
Source: own elaboration

Figure 1. General level of customer servicing performance in given channel
Source: own elaboration

Lead management at local level

The performance in dealing with online enquiries and customer contacts at subsequent stages can be divided into three levels and is presented in Table 2. First level can be characterized as virtually no service at all. I.e. in case of online channel this means no answer within three working days. Companies in second level made it possible for customers to get some information but the whole process was reactive and of limited support. I.e. customer service representative provided only general information and did not offer service continuity. Top notch companies were giving answers to customer requests fast and in proactive way showing problem solving attitude and continuity in servicing through different contact stages.

As shown in Table 2, online communication channel seems to be rather "plugged off" in terms of quality of service and ability to proactively engage customers at preliminary stage of their interest. As usually initial contacts with the customers are covered by the same group of employees, it came as a little surprise that the average performance in hotline channel is much better than in online one. Though it was not the goal of this study, one can speculate either are e-mail enquiries generally treated as spam or telephone contacts may be regarded as harder to manage and therefore more experienced personnel is allocated to this channel, while online is done by novice employees. Nonetheless, even if it looks better than online, hotline channel employees are also affected by limited access to detailed information, lacking proactive attitude (scarce test drive and offer proposals) and problems in maintaining further service continuity.

As previously indicated, for many years personal contacts have been involving most of efforts in automotive industry in terms of rising the standards of customer encounter. As revealed in this research these activities were successful. Proactive test drives offerings and customer data collection takes place in the majority of cases. Most of LM processes show continuity in customer dialogue (information derived from hotline channel used in contact). This positive image of salesperson behaviour ends however as the customer leaves. The majority of dealer representatives did

Table 2. Performance levels in customer servicing in given channel

Performance levels	Channel			
	Online	Hotline	Showroom	Follow-up
Level 1 (%)	25%	16%	11%	28%
Level 1 [description]	No feedback within 3 days	Impossible to get connected or unhelpful	Sales person busy and reactive; no service continuity	No follow-up
Level 2 (%)	52%	36%	34%	50%
Level 2 [description]	Slow or/and general feedback only	Reactive with basic information only	Sales person active; some continuity in customer service	Follow-up limited to second call only
Level 3 (%)	23%	48%	55%	22%
Level 3 [description]	Fast and detailed feedback	Proactive and very helpful	Sales person active; full continuity in customer service	Follow-ups with additional information and solutions

Source: own elaboration

not contact customers (by e-mail or phone) or did it only once. As they learnt that no fast sales is possible, customers were left with their objections unattended. While some research show only 25% of leads in sales pipeline are legitimate prospects [Gleanster, 2014], this cannot be explanation for sales persons disinterest as mystery shoppers taking part in the study were expressing strong buying interest, though were to express price objections after receiving written offer. Such behaviour is sometimes called "brooming". Salespersons ask few quick questions looking for quick sales and too often de-qualify significant number of prospect buyers wasting the investment incurred in generating these leads [Krogue, 2014]. Happily among those salespersons who tried to continue customer dialogue, the average standards fulfilment reached more than 70%, especially in terms of financing offer. Nonetheless, if one would assume prospect buyers convert into customers only if offered best service at every stage, the gap between online enquiries and sales can be calculated for 98.66%. In other words one and a half in hundred online contacts bring sales if attended improperly.

Lead management at NSC and local level

As first study was conducted solely on dealer level, one could interpret the results in light of accidental problems of Poznań area dealers. Therefore second study was launched aimed in examining if active role of NSC in LM process has positive influence on overall performance.

First chance to capture customer data and start LM process was downloading online brochures from official national brand websites. It turned out however, that any of brands in research required customers to give their personal data while downloading e-brochure or other material. It can be probably explained in terms of easing access to information at initial buying stage and reducing number of cold leads put in the sales funnel. Still surprisingly there even was no attempt to use this opportunity to ask customers on their buying intention, i.e. in form of prompt box "You have downloaded our brochure, maybe you are interested in getting an offer or test drive?".

Second occasion to collect customer data examined in this part of research was online test drive request. This time every brand offered such possibility in exchange of comparable sets of data (name, surname, contact data, particular dealer and car model) what seems to be a worldwide standard [Sauberlich et al., 2005, p. 292]. As it is shown in Figure 2, some brands put qualification call from centrally operated hotline in the process, but in any case 100% of enquiries were qualified this way. The stage of dealer call reached in general every second enquiry. Whether failures in online data collection system, mismanagement at central hotline operator level or dealer performance was responsible for not contacting with half of interested prospect buyers is unknown. If contacts took place, they were usually taken on the same day (with exemption of Mercedes-Benz and BMW which took three and four days respectively). Again as in case of research at local dealer level, premium brands were not a guarantee for good performance. Only two companies (Skoda and Ford) managed to arrange 80% of requested test drives within three working days. Most brands reached 60% level of arranged test drives with exemptions of completely disastrous 20% (BMW and SEAT) and 0% (Hyundai). With final loss of leads in the process reaching 58%, this outcome proves poor performance in connecting online with other communication channels and is indication of mismanagement of people, processes and superficial use of ICT tools widespread across the leading industry.

Conclusions – research implications

Companies must take a more detailed look at their online communication strategies. While the importance of this channel is obvious, marketing in so-
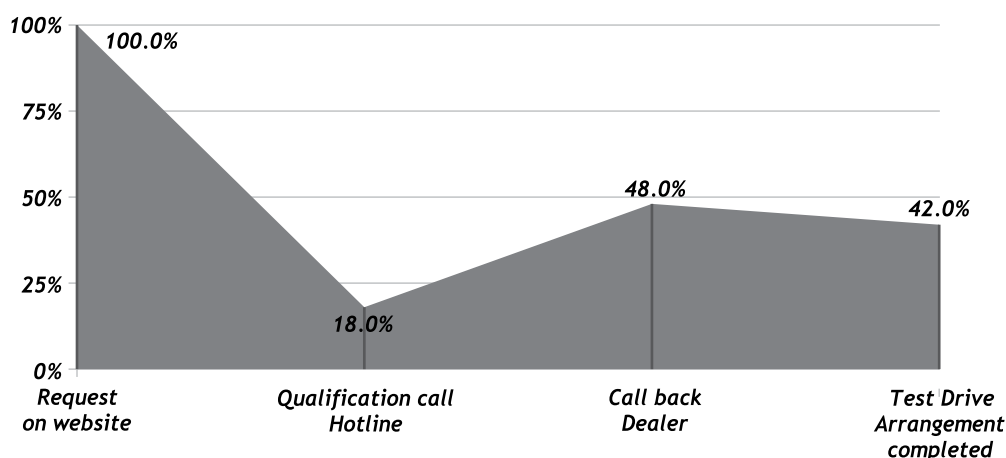

Figure 2. Loss of prospect buyers in NSC/dealer LM process
Source: own elaboration

cial media is hot topic among researchers and business professionals and broad discussion on advanced use of Web 3.0 semantic technologies is under way [Murugesan, 2010], owing to this research many companies may still have problems in managing contacts with customers who directly express buying intensions. Especially lacking competences and motivation of front office employees, limited set of information their provide and customer data integration problems reduce chances for successful transfer of leads into contacts closer to purchase by more than 50%. This builds-up a gap in communication at the crossing of online and offline channels, decreases conversion rates in sales funnel significantly and distracts companies' attention from building relationships with the customers in favour of winning new. This attitude nears affected businesses to inefficient transactional approach of servicing the market and cannot be justified with the common claim most of online contacts are spam. Such view is similar to excuses made by sales persons in late 20th century for not paying attention to every customer who enters the showroom or other sales premises. As this research shows on the example of automotive industry, companies have managed to successfully educate their direct sales personnel to take every offline sales opportunity seriously. Now it is high time to do it in relation to online opportunities as well to learn how to couple all people working at frontline to cooperate.

Another point of reflection should be sales persons' reluctance to make follow-up contacts. This damaging phenomenon which according to this research could be responsible for loss of up to 78% qualified prospects seems to be resistant to any motivations schemes, training programs, managerial skills and CRM systems monitoring. As earlier research focused on overall CRM strategy success factors indicates, in almost every second case, the main reason for such failure may be lack of commitment and conviction of line employees about implementing the changes in servicing customer [Greenberg, 2004]. In complex sales organizations such as in automotive industry, this seems to be still a challenge especially in the context of lead nurturing and customer data processing. The answer to both problems lays in the hands of top management responsible for making company fit for authentic customer relationship management, which is based on three dimensions: the strategy towards customers, the electronic systems and change management focused on own people and processes [Deszczyński, 2014, p. 542]. In fact performance in managing online leads may be treated as a mirror reflecting company's proficiency in other fields of customer service. If it is done poorly at the point so close to sales, it will be probably even worse where the goals are more intangible, i.e. in complaint management or other after-sales activities. In this context lead management should advance as one of priorities in top management concern.

Limitations and future research

The limitations of this research are of two different nature. First is the number of companies in research pool in one chosen industry. Though in the first study 55 entities were examined and in second study additional research of cooperation of NSC with its dealers was conducted, it still remains a spot check in automotive industry, which can be not representative for born-online retailers or even traditional B2C industries such as jewellery and other consumer durable goods.

Second point is taking only national perspective. Although every brand in the research pool has at least continental range and Poland is a big and competitive market [Ernst & Young, 2014] local issues, i.e. relatively short tradition of professional dealer businesses could have taken some influence on overall performance. Therefore it would be interesting to use the same methodology and conduct additional research in order to capture possible national or industrial regularities across Europe and beyond.

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Komunikacja z klientami z wykorzystaniem kanałów on-line i offline w procesie zarządzania szansami sprzedaży

Streszczenie

Mimo że nowoczesne kanały komunikacji oparte na Internecie odgrywają coraz ważniejszą rolę, nadal w wielu branżach dominujące znaczenie zachowały tradycyjne kanały sprzedaży. W związku z tym wyzwaniem dla przedsiębiorstw jest wprowadzenie odpowiedniej kombinacji środków i kanałów komunikacji z klientem (zarówno online, jak i tradycyjnych), które zapewnią płynną i szybką obsługę procesu zakupowego nabywcy. W artykule przedstawiono wyniki badań wpływu poszczególnych kanałów komunikacji obejmujących obsługę online, telefoniczną oraz bezpośrednią w salonach sprzedaży samochodów na proces lead management (zarządzanie szansami sprzedaży). Badania podzielone na dwa etapy przeprowadzono na grupie ponad 100 przedsiębiorstw. W obu etapach wykorzystano metodykę badań tajemniczego klienta. Wyniki badania wskazują, że najwyższe zadowolenie klienta osiągane jest w przypadku obsługi bezpośredniej, podczas gdy zapytania kierowane online uzyskały zdecydowanie niższą ocenę pod względem efektywności i jakości obsługi. Ponadto, porównując zapytania online z obsługą w salonach, zaobserwowano nieciągłość obsługi występującą w ponad połowie przypadków.

Słowa kluczowe

lead management, CRM, branża motoryzacyjna