INTELLIGENT
Web Forms

RINGLEAD **INTELLIGENT WEB FORMS**

TABLE OF CONTENTS

INTRODUCTION

Data Cadence: The beginning sets the state

The absolute first entrance of data into your CRM establishes the potential impact that data will have for its life in your CRM. Take a new lead as an example. If a lead enters your system and it is incomplete, a chain of events take place.

- The lead account name was incomplete and they wonder why someone is trying to sell to them again.
- A sales rep makes a call on another reps account, which confuses the prospect
- The lead is already a client and they wonders why someone is trying to sell them, again
- A duplicate is created in the system
- A personal email was used and you have no idea who the company is
- The email was incomplete, so the lead sits for a week or longer
- The Work Direct Dial/Mobile Phone was not filled in and no phone call is made
- Title was not complete and you do not act quickly, even though they are a decision maker
- You have no social data and you could have discussed common interests, but you don't
- The industry is unknown and the lead is not routed to an in-house expert in the industry

These are only short term effects. What about "long term"?

- The abandoned lead stays in the system, coming up in the reports, but not making an impact
- The incomplete data is off, therefore reporting will be inaccurate, forever, as it relates to this record
- The lead-opportunity ratio will suffer
- If reporting is off, your metrics are off

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- If metrics are wrong, analytics are wrong
- The duplicates in your system grows exponentially
- The more duplicates you have, the harder it is for sales reps to pull up the right account
- Sales reps spend time manually researching online, trying to fill in missing data and have less time to sell
- There's less time to sell, it's hard to find data, the reporting is off, the metrics are off and revenue suffers
- Sales forecasting is only available the last few days of the month
- Sales works longer hours with less results and there is no revenue added to the pipeline

Alternatively, when a lead passes through RingLead DMS Intelligent Web Forms, a positive data cadence is initiated.

- The data is Normalized, Verified and Enriched
- Enriched data is easily routed to the correct Sales rep because key fields such as location, revenue, employee count and industry are included. Duplicates are avoided.
- The data is complete, including direct dial number and mobile numbers for immediate action
- With clean data, reporting is accurate
- With accurate reporting, analytics are accurate and insightful
- Sales reps and sales leadership have an accurate view of pipeline
- Sales forecasts are living, breathing measures of sales potential

THE ANATOMY OF INTELLIGENT WEB FORM

What makes an intelligent web form? *How does it work?*

RingLead DMS Intelligent Web forms performs multiple steps in a specific sequence to get optimal results. The level is unparalleled in the industry.

- **Form assistance -** User Interface, which assists the user in selecting their own company. This reduces the number of fields that the user is required to type.

- **Normalization -** Standardize data to make sure data conforms to a predefined and personalized standard that matches the standards in your CRM.

- **Field Level Validation** - Make sure the right data type is in the right fields. Everyone has seen a phone number in an email field or address in a company field. RingLead's intelligent web form will validate only that the correct information is in your email field.

- **Format Validation** - Another type of validation that works on data such as addresses, making sure the format is correct

- **Referential Validation** - We have an address, it is in the correct format, but does the address exist or did someone type in the Munsters address (1313 Mockingbird Lane in Mockingbird Heights)?

- **Dedupe** - Works in conjunction with Lead Routing. Based on the business rules selected by you, detect a potential duplicate and then route the Lead to the correct sales rep.

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- **Enrichment** - Fill in missing firmographic fields to guarantee a higher match rate for contact data including validated emails, addresses, direct dials, social data and mobile phones. Everything Marketing and Sales needs to engage.

- **Segmentation** - What is the level of title input; Director, VP, C-Level? What department are they from? Are they the top Marketing contact from their company? What is their role?   Is their email from a corporate domain or is it from a free email provider? The enrichment from intelligent Web form allows for powerful segmentation and engagement via specialized messaging and routing. Segmentation allows powerful engagement.

- **Lead routing** -
  (1) Based on the record being a dupe or not,
  (2) the attributes discovered by segmentation and enrichment and
  (3) your customizable rules, route the lead to the best place and
  (4) Lead scoring to order priorities and take immediate action.

Take any of these crucial steps out of the equation, and form fill can fail and lead to many associated problems. Combining these steps together is the genesis of DMS Intelligent Web Forms.

PART 1: **THE RINGLEAD ADVANTAGE**

THE RIGHT ORDER OF THINGS - NORMALIZATION, VERIFICATION, ENRICHMENT

Copying what the other guy wrote; it seems to be the norm in the tech industry. They look at what others are doing and put a different spin on it. At RingLead, we like to think first, really understand the problems our clients are facing and then solve them. "Verify, and Enrich", we've read other papers out there and they seem to say the same thing. Verify the data, then Enrich it. This is totally wrong. Data Normalization is the first, fundamental step in any data process. As an example, if you Normalize (standardize for the layman) data first, dedupe following the Normalization will be 6X more effective. If you don't Normalize data first and try to verify it, it may be in a format that does not match the address verification database. Realistically, most verification systems will pick up variations of data, but it will not match all possibilities. Therefore, do it right, *Normalize first.*

1   **NORMALIZE** - Standardize data to the same format.
"Don't be faced with this problem"

2   **VERIFICATION** - Both field level, format level and and referential verification.
     FIELD LEVEL - is the data in the email an actual verifiable email?
     FORMAT LEVEL - is the data formatted to an acceptable variation
         (i.e. proper formatted email address)
     REFERENTIAL VERIFICATION - Is the data valid (i.e. real mailable address)

3   **ENRICHMENT** - Add missing data elements to the incoming lead form

Container Company Inc, The

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Container Co Inc, The	Container Co, The	The Container Co.
The Container Corp.	Container Corp Inc, The	The Container Co
The Container Co.	The Container Corp	

38 versions vs. a 1 Standardized Value

LEAD ENGAGEMENT IN REAL-TIME

Speed to engage a prospect is critical. According to The Lead Response Management study,
http://www.leadresponsemanagement.org/lrm_study

> ❯ **The odds of contacting a lead if called in 5 minutes versus 30 minutes drops 100 times**
> ❯ **The odds of qualifying a lead if called in 5 minutes versus 30 minutes drops 21 times**

Do you have what it takes to engage in five minutes? If an new lead is incomplete, you may not have the required data to engage in the five minute magic zone, even if you are prepared to connect. You need complete data to engage efficiently.

RingLead Intelligent Web forms gets you into the magic zone of engagement.

DID WE MENTION DIRECT DIAL AND MOBILE PHONES?

While covered under under data enrichment, it is worth diving deeper into the power of direct dial phone numbers. When available, a direct dial phone provides 4X improvement on engagement speed. If you only have a main corporate number, you may miss the magic zone of connecting to your new lead within 5 minutes. RingLead enrichment includes corporate direct dials as well as mobile phone numbers.

SNEAK PEEK OF WHAT'S INSIDE DMS:

Backed by patented technology, RingLead's Data Management Solutions (DMS) is the only cloud-based, end-to-end data management solution on the planet that provides 360° care for your CRM and marketing automation system. Within DMS your team can clean, dedupe, normalize, protect, and ENRICH your data.

DMS DUPLICATE PREVENTION
Prevent duplicates from being created through web forms, manual entry and list uploads using DMS Duplicate Prevention.

DMS CLEANSE
Automate data quality within your CRM with our deduplication task scheduler found in DMS Cleanse. Use 55+ custom matching logic rules to identify and merge duplicates based on your company's unique needs.

DMS CAPTURE
Discover, capture and import quality leads in seconds using DMS Capture.

DMS ENRICHMENT
Add direct dials, mobiles and social links to your key leads, contacts and accounts in real time using DMS Enrichment.

DMS addresses the demand for a product that bridges the gap between sales leaders and marketing executives by providing clean, rich data, and flawless integration.
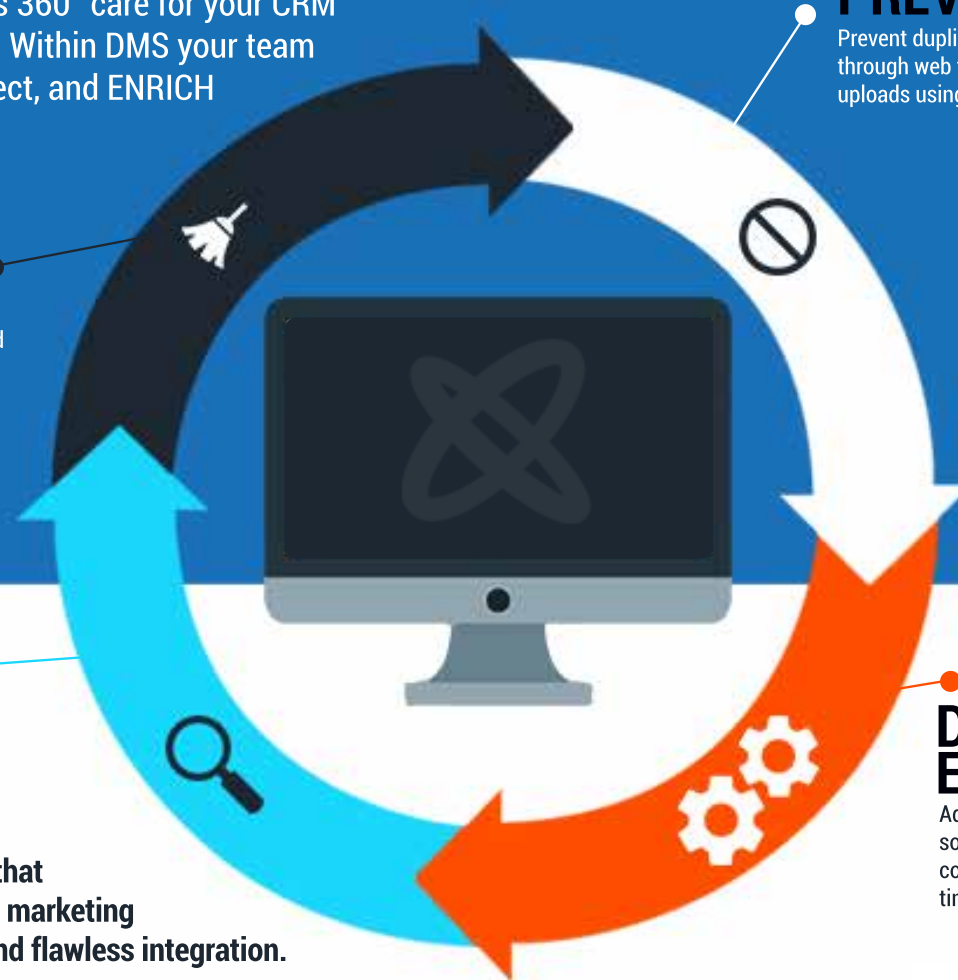
For a free personalized demo of DMS, give us a call at **+1 (888) 240-8088** or **click here.**

EMAILS: DON'T BE A DATA FOLLOWER -
SEGMENT, TAG AND VERIFY

Basic email verification is a commodity. So what is premium email verification? Basic verification will validate the email format, but it won't tell you if it's deliverable and it won't help you segment. RingLead provides additional attributes that provide additional insight to improve and protect your email sender score.

ISP FLAG: RingLead has identified thousands of free email providers worldwide such as gmail.com, yahoo.com, outlook.com, etc. RingLead will let you know if an email is a corporate email such as ringlead.com or a free email provider. In addition RingLead will provide additional attributes about the email.

ROLE BASED: Sales@ringlead.com, info@ringlead.com. These types of emails should be treated differently in marketing automation campaigns. A role-based email could be a distribution list that goes to many people.

LOCATION BASED: vegas@ringlead.com, milwaukee@ringlead.com: These location based emails should also be tagged and treated differently.

PART 2: **DATA SCIENCE**

THE LAW OF DATA COMPLETENESS

A complete record includes all the data elements required to perform a masterful sale. Think. If you had to manually gather all the data you could possibly need to identify, engage, build rapport, perform a sales demonstration and then close the opportunity, what data elements would you need to succeed? Due to time constraints sales reps and sales leaders alike don't naturally think this way.

Why? They want to scale sales. Doing manual research for every possible lead is inefficient in this day and age. However this is exactly the way to think. First identify the data elements that would want to add to engage masterfully, no matter how much time it takes. That is you shopping list. This will give your clarity. Take the time. it will pay dividends.

RINGLEAD IS BOTH A DATA ORIGINATOR AS WELL AS A PARTNER TO THE BEST DATA PROVIDERS.

RINGLEAD DATA INCLUDES:	
CONTACT DATA FILLED	**ACCOUNT DATA**
Emails	Industry
Mobile work phone	Revenue
Direct Dial work phone	No. of Employees
Social	Company LinkedIn
Email verification status	SIC Code
Email specialty status	NAICS Description
• Role based	HQ Phone
• ISP based	Company Email
• Location based	HQ Street
Titles	Year Established
Segmented title for role identification	Company Facebook URL
Phone	HQ City
Mobile work phone	HQ State
Direct Dial work phone	HQ Zip
	HQ Country
	SIC Description
	NAICS Description

LEAD CONVERSION RATE & BUSINESS POTENTIAL

Lead conversion rate depends upon two main factors. The first is the data that you have to work with. The second is your business process. So what do you focus on first? The data. If your first quarter of sales works off of main company phone numbers, your business process is limited to calling a main number and only possibly getting to the person you want to engage. Data defines the cadence. When the next quarter comes around and you then have direct dial numbers to work with, the sales leader looks like a superstar. Then lead conversion rates skyrocket because the base foundation of all metrics widen. More connects equal more conversations. More conversations leads to more opportunities, which yields a larger pipeline and ultimately, more revenue.

DRIVE YOUR REVENUE. DREAM FIRST. *WHAT DATA DO YOU NEED?*

PART 3: **REAL WORLD RESULTS**

DMS INTELLIGENT FORMS IS ONLY THE BEGINNING

Data is cyclic. If you've done your job and every new incoming form has been enriched, stop, breathe and give yourself a pat on the back. Like an explorer, you are the first in your company to raise yourself up and see clearly. Bask briefly in your accomplishment. But wait, ahead of you, you will see another mountain, another peak, another challenge. What happens to your beautiful new lead record once it is enhanced?

The next question(s) you need to ask:

2

How do I route my new lead to the correct sales rep?

1

Is my CRM READY for my new lead?

3

How do I keep my CRM data clean and continuously protect it?

THESE ARE TRICKY QUESTIONS.
Many a CRM admin has fallen to these oversights.

THE REALITY IS:

Enriching new leads/forms is not enough. You must also clean your existing CRM data.

Why? **If you have duplicates in your CRM, how can you possibly route the lead to the correct place every time?**

You can't. **If you haven't Normalized your data, dedupe will have 1/6th the impact.**

END THE WAR BETWEEN SALES AND MARKETING

Marketing trends are moving in the direction of requiring less fields on a form. It makes the marketer look good as they get more conversions and less form abandonment. It's a great bullet point on their resume for the increased form conversion rates. Everyone is happy, right? Wrong! Sales is raving mad. They get a new lead with an email only. No name, no title, no phone number and no way to engage.

Sales wants as much information as possible. They want as many items as possible filled in on the lead form, but more required fields leads to more form abandonment.

THIS IS THE WAR BETWEEN SALES AND MARKETING.

RingLead can end that war and bring inter-departmental harmony. From as little as a corporate email, RingLead can provide data enhancement to make both Sales and Marketing happy.

SEAMLESS PLATFORM

Intelligent web forms are an integrated part of the RingLead DMS platform. Solve an enrichment challenge on web form lead enhancement and you can use the same logic for list import. Segment a special section of your database to dedupe, use the same logic and apply this to data enhancement.

RINGLEAD DMS IS A SECURE SAAS BASED PLATFORM THAT CAN BE ACCESSED BY YOUR ENTIRE TEAM.

ONE X 4

I'm convinced, I need a complete solution, but Arghhh. I don't want 6-7 vendors

To accomplish use (1) Web Form Enhancement, (2) List Import, (3) CRM Dedupe, (4) Data Normalization (5) CRM Enhancement (6) Marketing Automation cleanup and (7) Duplicate prevention

You are looking at seven distinct technical processes.

Each is different, and each plays a critical piece of the data puzzle.

ONE VENDOR. ONE SUPPORT NUMBER. ONE SOLUTION. ONE BUDGET.

RingLead DMS (Data Management Solution) is a consolidated SaaS platform that seamlessly handles all seven challenges in data management. With world class support, training and thought leadership, RingLead is a trusted advisor, vendor and technology partner to companies fighting the good fight daily with data in CRM and Marketing Automation systems.

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Boost Lead Conversion with shorter Lead Forms with DMS Intelligent Web Forms Manager

Every business needs a steady stream of sales leads. However, a sizeable number of prospects are lost because of lengthy and time consuming forms. Our Intelligent Forms Manager leverages the first company information entered on a Marketo Web Form to autofill valuable firmographic information such as a company's address. With DMS Intelligent Web Forms, organizations can generate more leads with complete and accurate company information, while keeping their web forms painless and buyer-friendly.

INCREASE ROUTING & CONVERSION WITH ENRICHED AND VALIDATED DATA

WHAT THEY SEE

First Name: [   ]

Last Name: [   ]

Email: [   ]

Company: [   ]

Phone: [   ]

[SUBMIT]

WHAT YOU GET

- ✓ First Name
- ✓ Last Name
- ✓ Email
- ✓ Company
- ✓ Phone
- ✓ Address 1
- ✓ Address 2
- ✓ City
- ✓ State
- ✓ Country
- ✓ Postal Code
- ✓ State Code
- ✓ Country Code

- ✓ Employee Count
- ✓ Employee Location Count
- ✓ Annual Revenue
- ✓ SIC
- ✓ SIC Industry
- ✓ Name
- ✓ NAICS
- ✓ NAICS Sector Name
- ✓ Company URL
- ✓ LinkedIn
- ✓ Twitter
- ✓ Direct Dials
- ✓ Mobile

ABOUT RINGLEAD

RingLead, Inc. is the fastest growing SaaS data management company on Long Island. RingLead offers a complete end-to-end suite of products to clean, protect and enhance company and contact information. Since 2003, RingLead has helped solve the dirty data problems of thousands of enterprises, Fortune 500 companies and small businesses across the globe.

RingLead's Intelligent Web Forms bridges the gap between a marketer's desire for shorter web forms, and a rep's desire for more complete records," said Akshay Walvekar, Intelligent Web Forms' lead developer. "Intelligent Web Forms ensures that new leads are enriched with critical firmographic fields like company address and validated email addresses, dramatically improving matching and routing."

Akshay Walvekar, Intelligent Web Forms' lead developer.

DMS
DATA MANAGEMENT SOLUTIONS

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