

## Docmetrics White Paper Series: Better Lead Generation with PDF Content

Part I: The Power of Pass Along: Getting to the Decision Maker

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### Abstract

In order to realize the full potential of PDF as a lead generation tool, marketers need to gather detailed data on all of their readers. In this white paper, we discuss how software that embeds dynamic forms within PDF documents can help companies to improve both the quantity and the quality of their sales leads.

In doing so, we hope to increase your understanding of how in-document form technology can empower marketers to

- ▶ generate and score a large number of high-quality sales leads
- ▶ leverage online document sharing to identify key decision makers

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## Introduction

In recent years, marketing content distributed online using PDF has become an important lead generation tool for many marketing departments, particularly in information technology industries.

PDF content is a powerful tool for propagating a marketing or thought-leadership message. By allowing PDFs to circulate freely, marketers can leverage online content sharing to reach a large number of prospective customers.

This peer-to-peer pass along also increases the likelihood that content will find its way to the desktops of key decision makers, as a document will typically be downloaded by a junior employee before being passed up through the company hierarchy.

Most marketers use web registration forms to collect data on readers who download their documents. Web forms allow marketers to generate leads but these leads often require a great deal of additional qualification to identify decision makers.

This is because web forms have two very serious flaws:

1. they cannot gather data on pass-along readers – who are often the most valuable leads
2. to gather a usable amount of data, they must often be excessively long and complex

To go beyond the limitations of web forms, marketers should adopt software that allows them to embed dynamic forms in their PDFs. Recent developments in third-party PDF technology have made software of this kind widely available for the first time.

*"Peer-to-peer 'pass along' is extremely widespread and represents a very efficient method of getting a marketing message to a broad but targeted audience."*

### Lead generation is a key concern for B2B marketers

Business-to-business (B2B) marketing departments are continually striving to find ways to supply their sales representatives with more sales leads and – crucially – more *high-quality* sales leads. A 2006 Forrester study noted that "B2B marketers list improving lead quality and generating more leads among their top challenges."<sup>1</sup>

While the details of what constitutes a high-quality lead will vary between companies, there are two key qualities that any sales department will look for in a lead:

1. the lead must have demonstrated an interest in the product or service being sold
2. the lead should be a decision maker with authority to purchase this product or service

### PDF content is a powerful lead generation tool

In recent years, distributing content online in Portable Document Format (PDF) has emerged as a potentially powerful strategy for identifying, engaging and gathering data on leads. Many companies, especially in information technology industries, now use PDF white papers, case studies and data sheets as key lead generation tools.

A 2006 study by MarketingSherpa counted "more than 48,000 white papers being promoted online by business-to-business marketers." A 2004 report quoted in the MarketingSherpa study stated that "57% of information technology purchase decision makers said a white paper influenced at least one buying decision in the past 12 months."<sup>2</sup>

### PDF sharing gets content to decision makers

One of the great advantages of distributing marketing content using PDF is that readers are able to email particularly relevant documents to their friends and colleagues. Peer-to-peer "pass along" of this kind is extremely widespread and represents a very efficient method of getting a marketing message to a broad but targeted audience.

<sup>1</sup> Forrester, *Improving B2B Lead Management*, Laura Ramos, October 2006

<sup>2</sup> MarketingSherpa, *How to Syndicate your White Paper Successfully: 12 steps, 8 Mistakes and Creative Samples*, Dianna Huff, 30 November 2006

*"Pass along also increases the chances that a marketing message will get to the right readers."*

Pass along also increases the chances that a marketing message will get to the *right* readers. Commonly, a document will be downloaded by a junior member of an organization and then passed up the company hierarchy. If the content is relevant enough to the organization's needs, it will go all the way to a company decision maker.

The 2006 MarketingSherpa report quoted above noted that "the more people who read your white paper, the better your chance of closing a deal" and reported that "69% of prospects who download and like your white paper will actively pass it along to their colleagues. 36% of total downloads will be passed on to a supervisor."

### Web forms help marketers to generate and qualify leads

Clearly, PDF content is a powerful tool for communicating and propagating a B2B marketing message. But for PDF content to be useful as a lead generation tool, marketers must identify precisely who their readers are and gather the additional information on these individuals necessary to identify high-quality leads.

For most marketers, web registration forms present the only available way to capture this vital lead generation and qualification data. By requiring readers to register online for PDF downloads, marketers are able to gather names and contact details from a large number of prospective customers.

For marketers or sales representatives to contact every individual who registered for a document in order to qualify their interest would be a poor use of resources. Marketers need a way to remove low-quality leads from the sales pipeline at the earliest opportunity. In most cases, this means adding qualifying questions to web forms.

So, for example, readers who register for a document will often be asked about their employer, department and position. It is also common for readers to be asked detailed questions that more explicitly refer to their potential interest in the product or service being marketed.

### The data provided by web forms is far from satisfactory

Web forms are widely used but this apparent popularity can mostly be ascribed to the fact that they have conventionally been the only way to capture lead data from PDF content readers. The fact is that while web forms may generate plenty of leads, many marketers fear that the best leads are being missed.

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*"Web forms only provide marketers with a single opportunity to capture actionable reader data, which occurs before the reader has even opened the document. What marketers really need is a way to dynamically capture data at multiple points after the download."*

Once a reader has registered for a document and downloaded it, most marketers have no way of controlling or monitoring what that reader does with the document. Readers can share the document with as many third parties as they like, without the knowledge of the original content provider.

Furthermore, any third-party reader who receives a document from a colleague is able to access the content without supplying any information to the content provider. While there is certainly value in getting content to these readers, it is unfortunate that marketers are failing to capture data on a great many of their readers.

Marketers are also failing to capture data on some of their most *important* readers – the decision makers who receive documents that are passed along within companies. With no way of registering pass-along readers, marketers are letting some of the highest quality leads pass them by.

Additionally, in order to capture actionable lead qualification data from a document's readers, a web form must often be so long, detailed and invasive that it is likely to

- ▶ discourage readers from registering for and downloading the document at all
- ▶ decrease the probability that readers who do register will provide valid data

### Marketers need to go beyond the web form to find decision makers

The flaws of web forms are rooted in a single cause. Web forms only provide marketers with a single opportunity to capture actionable reader data, which occurs before the reader has even opened the document. What marketers really need is a way to dynamically capture data at multiple points after the download.

In other words, marketers should adopt technology that integrates the collection of lead generation and qualification data directly into the reader experience as and when it happens. In practical terms this means embedding forms within PDF documents that are able to dynamically report the responses supplied, in real time.

For instance, if a simple registration form is embedded directly within a secured PDF, everyone who wishes to read the document can be required to provide their name and contact details in return for access to the content. This allows the content provider to gather lead data from the document's entire readership, including pass-along readers.

*"Finally, companies that distribute PDF marketing content can go beyond the web form to pinpoint decision makers who have the desire and ability to buy their products."*

By embedding supplementary surveys throughout the document, the content provider can gather detailed qualifying data, without having to ask for it in a single complex web form. Collecting this data in real time and driving it directly into a marketing automation system will allow qualified sales leads to be generated with considerable efficiency.

The standard PDF technology, as developed by Adobe, does not facilitate this kind of dynamic lead generation process. However, one of the great advantages of PDF is that it is an open format, which allows third-party developers to identify and fill this sort of gap in the format's standard functionality.

### **Dynamic in-document forms will revolutionize PDF-based lead generation**

Recent developments in third-party PDF technology are helping marketers to realize the full potential of electronic content as a tool for high-quality lead generation. The emergence of software that allows content providers to embed truly dynamic forms in their PDFs will revolutionize the way that marketers use PDF to generate sales leads.

Companies that adopt this technology will gain the unprecedented ability to dynamically gather information from readers who have downloaded their content, in order to

- ▶ generate real-time lead data on pass-along readers
- ▶ gather detailed lead qualification data, without impacting the reader experience

Given the importance of lead generation to marketers and the importance of PDF content to lead generation, the arrival of dynamic forms technology has come not a moment too soon. Finally, companies that distribute PDF marketing content can go beyond the web form to pinpoint decision makers who have the desire and ability to buy their products.

## Docmetrics enhances the lead generation power of PDF

Docmetrics is a web-based PDF analytics solution that empowers B2B marketers to use PDF-based content as a tool for generating and scoring high-quality leads, in real time. With docmetrics, marketers can embed dynamic forms and surveys directly within enhanced PDF documents.

The docmetrics system provides more comprehensive and valuable lead data than conventional web registration forms are able to supply because it

- ▶ collects information on pass-along readers who receive content from colleagues
- ▶ allows marketers to gather detailed lead-qualification data from within documents

Docmetrics is delivered via a user-friendly web-based application, making it quick and easy for marketers to

- ▶ create enhanced PDF documents featuring dynamic in-document forms
- ▶ generate intuitive, real-time reports that provide detailed insight into lead quality

To learn more, [visit the docmetrics website](#) or [contact us](#).



### What is docmetrics?

Docmetrics is a web-based application that allows users to enhance their standard PDF files, creating dynamic docmetrics documents which – unlike standard PDFs – are able to include

- ▶ **in-document forms** that provide data on *who* reads content
- ▶ **document analytics technology** that measures *how* readers read content

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