

Finding the pipeline marketing had already earned

Marketing was generating qualified leads that sales did not see in time. I traced the leak with data the business already had, rebuilt the handoff and planned the year around what worked.

Nine-figure

influenced pipeline

Weeks to days

time to first sales action

One plan

paid, email, web, partners, events and ABM

SITUATION

The commercial financial solutions business needed more pipeline. Campaigns ran in every channel, but nobody could show what marketing contributed, and qualified leads waited weeks for a sales response.

MY ROLE

I owned campaign strategy and measurement across channels. Business-unit leadership then asked me to act as sales and marketing operations lead for the effort, working with sales, channel owners, brand and product marketing.

RESULTS

Influenced pipeline reached nine figures. Lead volume grew through year-end, and sales acted on leads within days instead of weeks. The 2026 plan was the first built on measured channel performance.

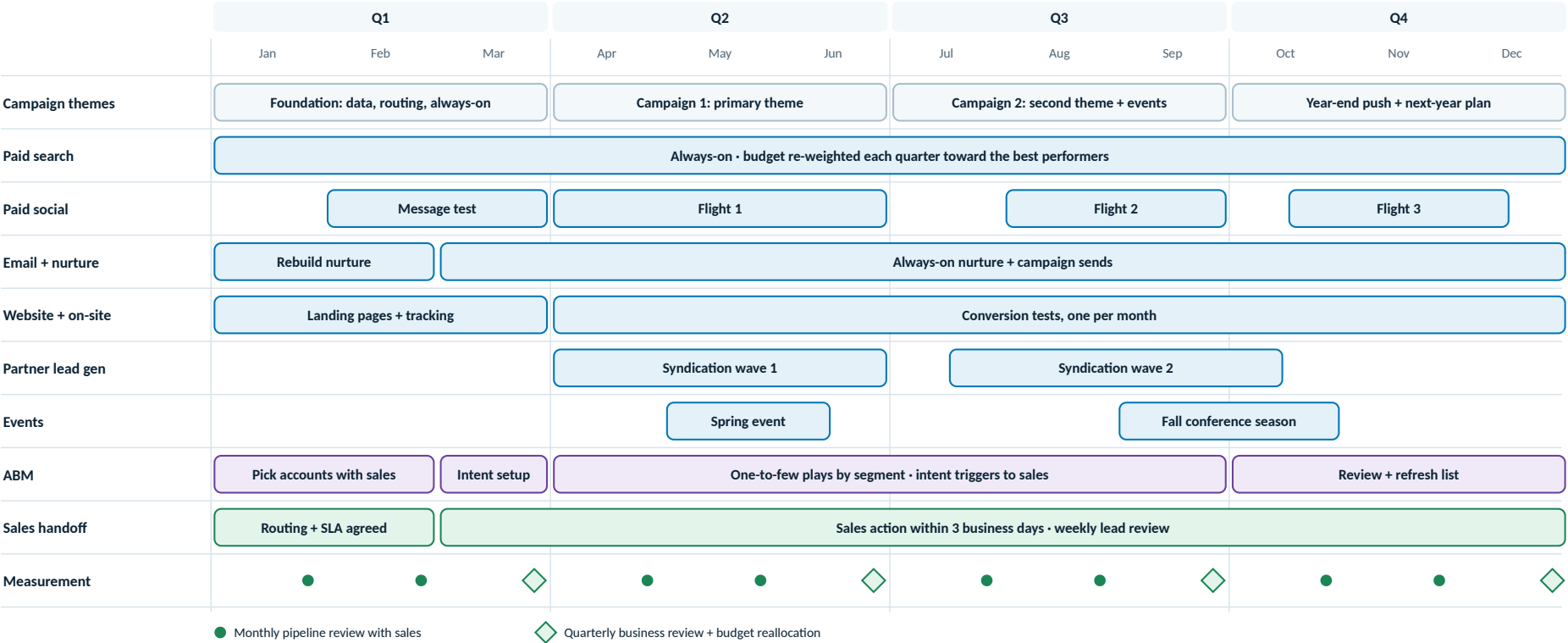
WHAT I CHANGED

- 1 Traced the funnel with existing tools**
Used the data platforms already in place to follow leads from first touch to sales action. That surfaced a backlog of qualified leads with no follow-up.
- 2 Rebuilt the handoff with sales**
Agreed routing rules, a follow-up standard and a weekly lead review. Time to first sales action dropped from weeks to days.
- 3 Aligned every channel to one message**
Paid, email, on-site, partner lead generation and events ran the same targeting and message, which lifted lead volume through year-end.
- 4 Planned the next year from evidence**
Moved budget to the best-performing channels, set campaigns by quarter and forecast results from real conversion rates.
- 5 Added ABM where speed mattered**
Chose target segments with sales and passed intent signals to reps, giving in-year revenue a faster path.

Still in progress when my time on the project ended: sales-cycle support designed to move later-stage deals faster had launched but had not yet produced a measured result.

Sample campaign plan and calendar

A twelve-month integrated calendar. Each channel has its own lane, ABM runs alongside the one-to-many work, and the sales handoff and measurement rhythm are planned like any other channel.



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 One-to-many demand

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 Targeted and ABM

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 Sales and revenue

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 Planning and measurement

Representative sample that shows how I structure a plan. It is not an Optum document, and themes and timing are illustrative.

Channel roles in the plan

CHANNEL	JOB IN THE PLAN	PRIMARY MEASURE
Paid search	Capture existing demand all year	Qualified leads and cost per qualified lead
Paid social	Reach target roles in flights tied to each campaign	Engaged accounts and landing page conversion
Email + nurture	Move known contacts toward a sales conversation	Leads reaching the scoring threshold
Website + on-site	Convert campaign traffic and test offers	Form conversion rate
Partner lead gen	Add reach in segments the house list misses	Lead-to-opportunity rate by partner
Events	Create conversations with target accounts	Meetings booked and pipeline influenced
ABM	Speed up pipeline in segments chosen with sales	Target accounts engaged and stage progression
Sales handoff	Route and act on every qualified lead	Time to first sales action

HOW THE FORECAST IS BUILT

Each quarter starts from the previous quarter's real numbers. Expected leads by channel are multiplied by that channel's qualification rate, sales acceptance rate and opportunity rate, then by average opportunity value. Budget moves toward the channels with the best cost per opportunity, and the forecast is checked against actuals in the monthly pipeline review.