



# How ExactBuyer Increased Qualified Leads and Improved Lead Routing

**CASE STUDY** *A Reform Custom Form implemented by FunnelEnvy*

**90%**

engagement rate

**30.5%**

demo form conversion rate

**26.4%**

decrease in exit sales

*"It's working really, really smoothly, and we've been seeing a lot of success in our lead generation thanks to their recommended strategies.*

*I highly recommend FunnelEnvy's services to anyone seeking to streamline their sales operations and drive growth."*



**Edan Krolewicz,**  
the Founder and  
CEO of ExactBuyer

## SUMMARY

ExactBuyer is a data enrichment and sales enablement SaaS. As they rolled out a new product line to a different audience, they needed to ensure that high quality leads were being funneled to the appropriate sales reps.

Unfortunately, their existing website “Request a Demo” experience couldn’t handle the complexity of their new customer journey and suffered from a poor lead conversion rate.

By partnering with FunnelEnvy to implement a *Reform custom lead capture form*, they were able to roll out a multi-step form workflow that included routing, qualification, enrichment and integration with Hubpsot. The new form experience increased conversions from high quality prospects while simultaneously filtering out spam and low quality leads.

## ABOUT EXACTBUYER



**Industry:** B2B Sales Enablement SaaS

**Use Case:** Outbound Sales Prospecting,  
Data Enrichment, Contact & Company Search

**Region:** Americas

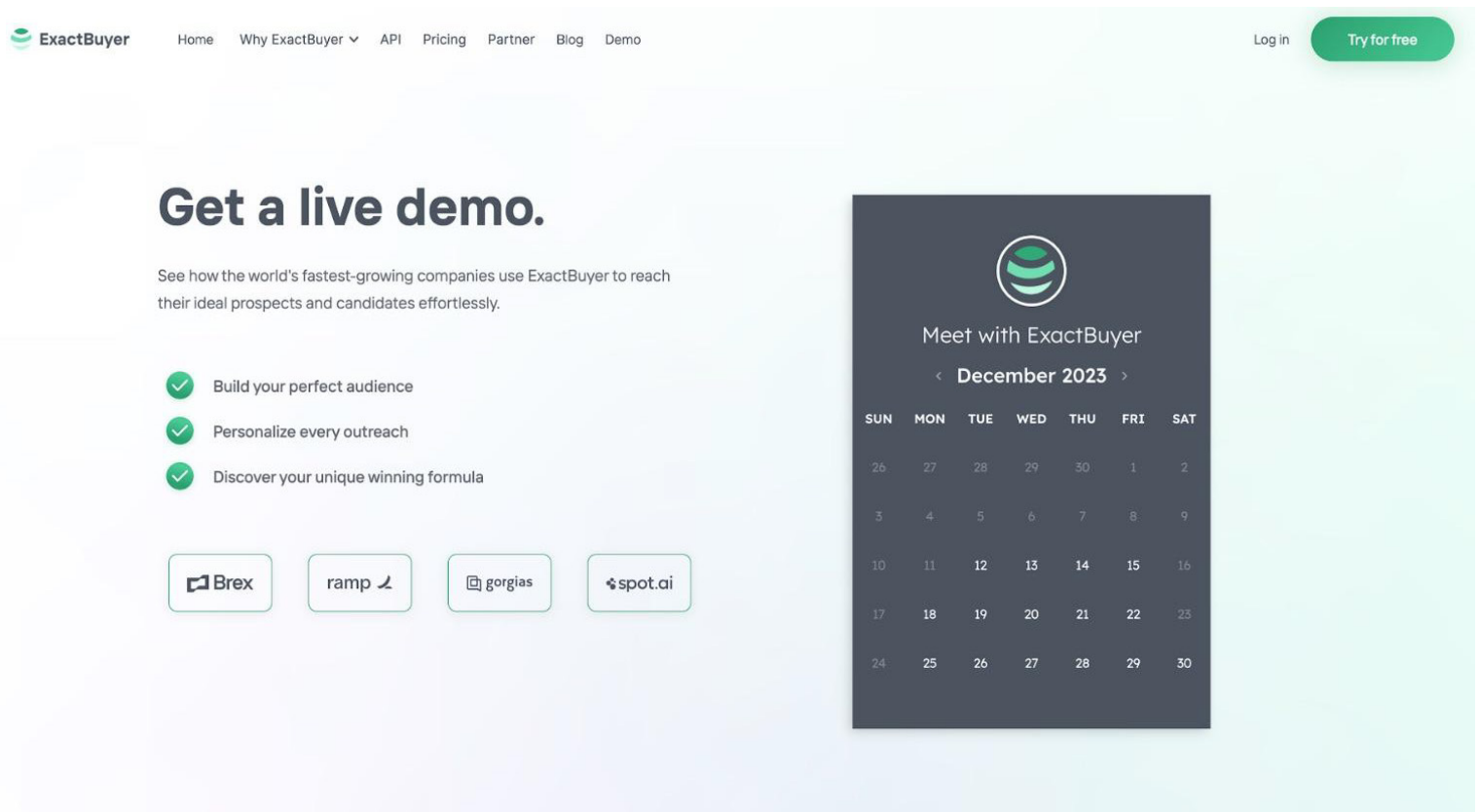
**Founded:** 2019

**Website:** [www.exactbuyer.com](http://www.exactbuyer.com)

# CHALLENGES

## Adapting the sales process to accommodate a new product offering.

As ExactBuyer broadened its scope from a data enrichment provider to introducing a fully automated outbound prospecting solution for SMBs, new challenges emerged. This expansion, aimed at diversifying its product range beyond the enterprise and developer-centric APIs, required an update to its sales processes to accommodate different types of customers and multiple product lines. The launch of a new website highlighted a key issue; the existing "request a demo" landing page was insufficient, featuring only a Hubspot calendar booking widget without a form.



*The old ExactBuyer "request a demo" website experience*

This experience proved inadequate for several reasons:

**Poor Conversion Rate** - Prospects had to schedule a meeting to be captured as a Hubspot contact. This additional burden on the visitor increased friction and suppressed conversions.

**No Routing** - A new product aimed at a different audience required developing new sales processes and training new reps to handle it. The calendar widget could not route leads to specific sales teams based on their product interest or needs.

**No Qualification** - In addition to filtering out personal emails and junk submissions, ExactBuyer wanted lower volume prospects to go through the product trial instead of talking to a sales representative. Their old “request a demo” experience had no ability to eliminate low quality prospects and qualify them based on the number of seats they needed.

**Measurement gaps** - The existing demo page did not support adequate tracking or attribution to help ExactBuyer’s team optimize their spend.

It was clear that if ExactBuyer was going to scale their go to market team and ensure that high quality leads made it to the correct sales team they would need to significantly improve this lead capture experience.

## THE SOLUTION

### A multi-step form workflow with lead routing, qualification, enrichment and integration with Hubpsot.

To address these issues FunnelEnvy worked closely with ExactBuyer’s team to design a solution that met the needs of their prospects as well as their sales team. The new form was designed as a multi-step workflow, to guide prospects to the appropriate outcome while also filtering out low quality submissions and reducing friction for high value leads.





**The FunnelEnvy team helped us think strategically about our product offerings and how our customers engage with different features. ”**



**Edan Krolewicz,**  
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The new form workflow included the following key features:

### 1. INTERACTIVE MULTI-STEP FORM

Drawing from over a decade of experience in form optimization, we implemented a multi-step conversational approach, proven to significantly enhance form conversions. By structuring the form as a series of relevant questions before requesting personal information, user engagement and relevance were maximized.

### 2. DYNAMIC QUESTION ROUTING

FunnelEnvy utilized the responses from the multi-step form to dynamically route visitors to different calendars based on their answers. This personalized approach ensured that users were directed to the most appropriate resources and representatives, enhancing user experience and conversion potential.

How many sellers would be using ExactBuyer?

None 1-3

4-10 11-20

20+

Next step

*Self-service lower tier prospects*

Create an account

Launch a campaign in ten minutes. No credit card required.

Continue with email

OR

Sign in as FunnelEnvy Sign up with Microsoft

Already have an account? Sign in

*Fast track high value leads to sales*

Meet with Edan

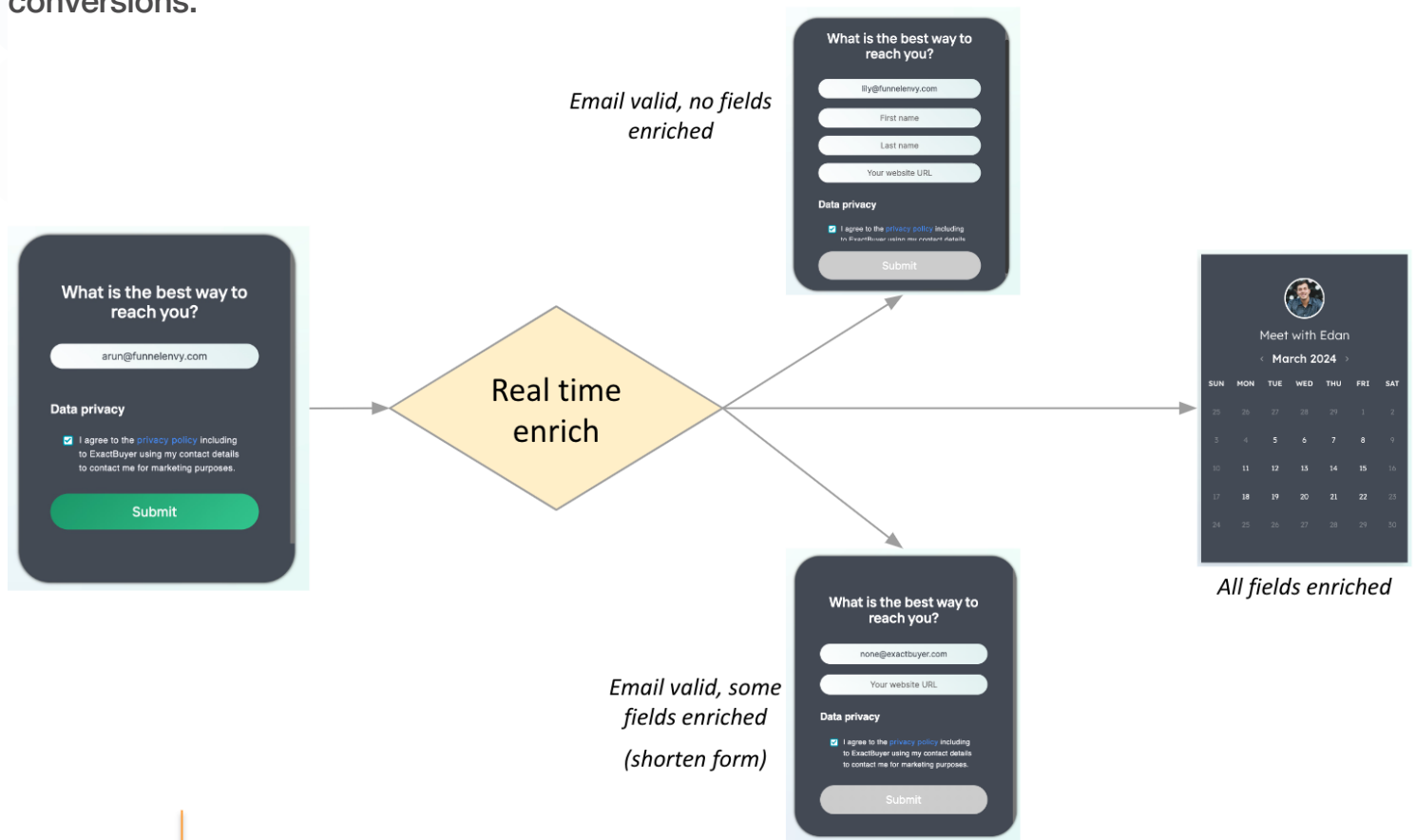
March 2024

SUN	MON	TUE	WED	THU	FRI	SAT
25	26	27	28	29	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

*The form effectively pre-qualified prospects and directed them to the appropriate destination—whether it's the founder's calendar, a sales representative, or a free trial.*

### 3. DATA-DRIVEN FORM SHORTENING

Leveraging ExactBuyer's extensive contact database, FunnelEnvy implemented real-time enrichment based on the email. We then optimized the form by displaying only the fields not filled with data about the prospect. For example, prospects would not have to enter name and company if those fields were returned in the enriched data set. This data-driven approach minimized form length, aligning with the principle that shorter forms generally yield higher conversions.



*By leveraging ExactBuyer's API for client-side enrichment, we dynamically modified form fields based on available data, ensuring personalized interaction and improved user experience. Fewer form fields always lead to more conversions.*

**Your information**

Thursday, February 29, 2024 5:00 PM [Edit](#)

First name \*

Last name \*

Your email address \*

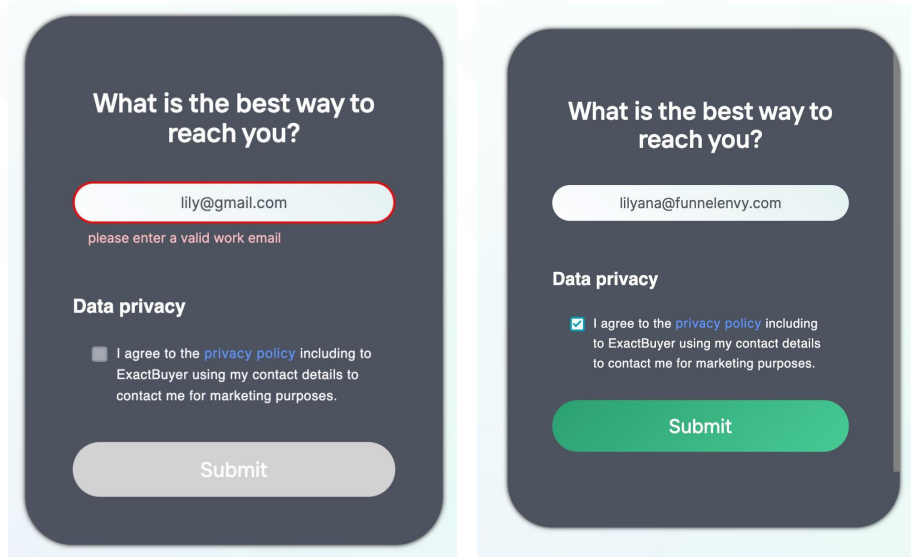
Website URL \*

[< Back](#) [Confirm](#)

*We also pre-fill calendar fields with existing lead information, thereby streamlining the booking process and enhancing user experience.*

#### 4. SPAM PREVENTION WITH EMAIL VALIDATION

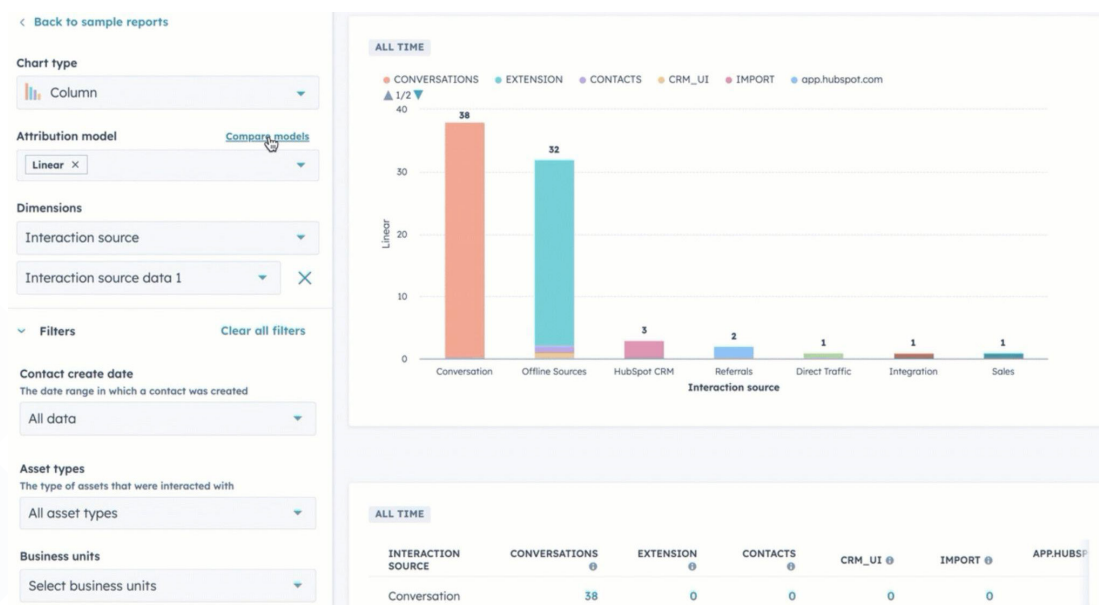
To mitigate spam submissions and ensure data integrity, FunnelEnvy incorporated email validation into the form submission process. By verifying the authenticity of email addresses provided, the risk of spam entries was significantly reduced, improving the quality of leads captured through the form.



*Email validation requires prospects to enter a business email address while blocking personal emails.*

#### 5. INTEGRATING WITH HUBSPOT AND ATTRIBUTION SUPPORT

FunnelEnvy integrated the form with HubSpot to ensure that even if visitors didn't book a meeting, a contact would still be created in HubSpot for nurturing and follow-up purposes. Additionally, capturing UTM parameters in the form was essential for lead attribution and marketing optimization efforts. This integration facilitated seamless lead management and enhanced campaign tracking capabilities



*Passing leads to HubSpot allowed ExactBuyer to centralize lead information. Capturing UTM parameters helps understand which channels and campaigns are driving conversions, allowing them to allocate resources effectively.*



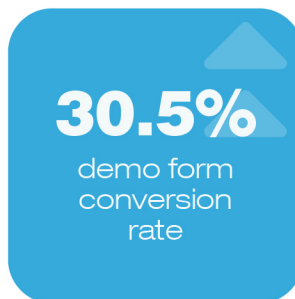
*“It was truly a holistic end-to-end experience, covering everything from attribution to integrating with HubSpot. With their expertise, we were able to significantly improve our efficiency and scalability.”*



**Edan Krolewicz,**  
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## RESULTS

**Form Optimization Drives a 26.4% Reduction in Exit Rates, a 30.5% Form Conversion Rate, and 90% Form Engagement Rate.**

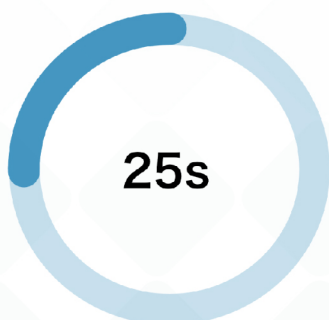


Upon analyzing data before and after the form update, a **significant 26.4% decrease in exit rates** was observed. This indicates an improved user experience, potentially leading to higher conversion rates. Visitors who saw the new interactive demo form are less likely to exit the page and more likely to engage with the form.

After the form implementation, we saw a remarkable **90% Form Engagement Rate**, suggesting that most users actively interact with the new demo form.

The **30.5% conversion rate** in demo form submissions surpasses the average demo requests conversion rates, indicating not only interaction with the form but also a higher number of leads generated for ExactBuyer.

### The average engagement time spent on the demo page



December 2023 -  
Old Form



February 2024 -  
Updated Form

*Just as important are the qualitative benefits to ExactBuyer's business. With the new lead capture form they are now able to scale their sales operations and send leads to the appropriate sales reps.*



*The positive outcome of this is now we can actually start to grow and build out our sales team in a way that will allow us to funnel the right types of leads to the right reps.*

*We've been seeing a lot of success in our process, and it's definitely become more efficient and allowed us to scale. So, I highly recommend it to anyone who's thinking about it.*



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## CONCLUSION

### ExactBuyer's Lead Generation Process Transformed in less than 30 days.

Our partnership helped Exact Buyer transform their lead generation process in less than 30 days. Through the resolution of critical form challenges, we enhanced the visitor journey, delivering a more personalized and efficient experience for potential leads. By implementing interactive multi-step forms, lead routing, form enrichment, and spam prevention, we improved engagement and ensured the capture of high-quality leads tailored to specific audience profiles and solution interests.

Integrating with HubSpot and capturing UTM parameters enabled seamless lead management and enhanced marketing optimization efforts.

This highlights how innovative form solutions not only drive business success but also enhance lead generation efficiency, paving the way for future growth in the dynamic B2B & lead generation markets.

## Interested in Reform Custom Forms by **FunnelEnvy**?

*If you'd like to learn more about how an improved form experience can increase your qualified lead conversions, get in touch with us today!*

**Get Started Now**