International Journal of Creative and Open Research in Engineering and Management
ISSN: 3108-1754 (Online)
Volume 02 Issue 10 October-2026 | Impact Factor: 3.5



From Cold Call to Qualified Lead: A Practice-Based Case Study of Inside Sales, Channel-Partner Enablement and CRM Discipline in B2B EdTech SaaS

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How to Cite this Article:
Dudhade, D. S. (2026). From Cold Call to Qualified Lead: A Practice-Based Case Study of Inside Sales, Channel-Partner Enablement and CRM Discipline in B2B EdTech SaaS. International Journal of Creative and Open Research in Engineering and Management, 02(10), 1-9. https://doi.org/10.55041/ijcope.v2i10.224

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https://doi.org/10.55041/ijcope.v2i10.224

ABSTRACT

Purpose: Software vendors selling to educational institutions face long buying cycles, multi-person decision units and tight budgets. Few practitioner accounts examine how top-of-funnel selling processes are operationalised. This paper details the inside-sales routine of an Indian collaboration-technology firm.

Design/methodology/approach: Descriptive single-case study based on participant observation during an industry placement (25 May – 31 August 2026), combining field logs, CRM dashboard extracts, and product documentation.

Findings: The CRM logged 122 assigned leads (107 personally profiled), 1 ,131 calls, and 6 qualified leads (4.9% yield) handed to field/partner sales. Qualification required ~190 logged calls per lead. Key drivers identified: decision-maker data accuracy, multi-touch engagement, and partner enablement. The paper develops the Qualify–Enable–Hand-over (QEH) model.

Practical implications: Recommends unified contact repositories, standardised webinar-to-training playbooks, and structured feedback loops.

Keywords: B2B marketing; inside sales; lead qualification; channel partners; CRM; EdTech; SaaS; India.

1. INTRODUCTION

Selling software to educational institutions is rarely a single conversation with a single buyer. Principals focus on learning outcomes, IT heads on security and integration, administrators on costs, and trustees on procurement regulations. Each stakeholder holds veto power. In India, this dynamic unfolds within a rapidly expanding EdTech market, driven by digital infrastructure expansion, policy backing under the National Education Policy 2020, and blended learning adoption (Ministry ofEducation, 2020; MarketsandMarkets, 2025).

High demand does not ensure frictionless sales. Vendors must locate decision-makers, assess lead viability, and determine optimal hand-over timing to field sales. These top-of-funnel activities are largely executed by inside-sales teams using telephonic and digital outreach, yet academic literature predominantly focuses on enterprise closing dynamics rather than early qualification mechanics.

This paper addresses this literature gap via a practice-based case study. The author completed an on-the-job placement within the inside-sales unit of InstaVC (the software division of PeopleLink Unified Collaborations). By analysing CRM datasets and observational records, this study addresses four central research questions: (RQ1) How top-of-funnel SaaS sales are structured in EdTech; (RQ2) What call-to-qualification effort ratios reveal; (RQ3) The role of partner-mediated engagement; and (RQ4) Which data-quality practices maximize productivity.

2. CONCEPTUAL BACKGROUND

2.1 *Organisational Buying Units*

Organizational purchasing revolves around buying centers comprised of users, influencers, deciders, buyers, and gatekeepers (Webster & Wind, 1972). Multi-stakeholder conflict must be resolved before deal finalization (Sheth, 1973). In EdTech SaaS, identifying who controls budget versus who evaluates usability is crucial to moving leads forward.

2.2 *Consultative & Relationship Selling*

Sales models have evolved from rigid transactional steps to adaptive, relationship-centric frameworks (Moncrief & Marshall, 2005). Needs-discovery strategies (Rackham, 1988) and insight-led selling (Dixon & Adamson, 2011) demonstrate that deep domain knowledge directly correlates with sales efficacy (Verbeke et al., 2011).



2.3 CRM and Sales Technology

Customer Relationship Management (CRM) serves as a strategic cross-functional bridge rather than a standalone software archive (Payne & Frow, 2005). Effective CRM usage directly influences sales effectiveness and cross-team transitions (Hunter & Perreault, 2007; Agnihotri et al., 2016).

2.4 Channel Partner Alignment

Manufacturer-distributor alliances depend on trust, communication, and formal coordination (Anderson & Narus, 1990). Joint webinars and opportunity registration ("case-lock") serve as formal alignment mechanisms in multi-tier sales channels.

2.5 Service Logic & Extended Mix

Technology adoption follows awareness, evaluation, and trial stages (Rogers, 2003). In line with service-dominant logic (Vargo & Lusch, 2004), inside-sales reps represent the "people" and "process" dimensions of the extended 7Ps mix (Booms & Bitner, 1981).

3. RESEARCH CONTEXT & FIRM

InstaVC, the SaaS unit of PeopleLink Unified Collaborations, delivers educational solutions including *inClass* (virtual classroom), *inLynk* (campus ecosystem), and *inBoard* (interactive AI whiteboard). Operating in the West Zone of India (Maharashtra, Gujarat, Goa), the firm faces intense rivalry, budget seasonality, and stringent government procurement rules via the Government e-Marketplace (GeM).

4. METHODOLOGY

This study employs a descriptive single-case research design via participant observation during a 14-week placement (25 May – 31 August 2026). Primary data comprised daily outreach activity logs, call records, and mentor feedback. Secondary data included CRM system extracts, sales collateral, and government policy documents. CRM activity logs were triangulated against field notes to ensure data accuracy.

5. FINDINGS & ANALYSIS

5.1 Phased Operational Workflow

The placement progressed across four main operational stages: Induction & Scripting (Weeks 1 –2); Direct Institutional Cold Calling (Weeks 3–6); Channel Data Mining (Weeks 7–8); and Partner Enablement & GeM Registration (Weeks 9–13). Each phase directly fed data into the next, confirming that top-of-funnel SaaS selling functions as an interdependent pipeline.

5.2 Yield Metrics & Touch Intensity

CRM records indicate 122 total assigned leads in the researcher's pool, of which 107 were personally profiled. Total logged calls stood at 1 ,131 . Only 6 leads (4.9% qualification yield) successfully advanced to field sales hand-over.

Touch intensity was substantial: approximately 188.5 calls were logged per qualified lead generated, and 10.6 calls per profiled lead. Revenue closed at the intern stage was ₹0, as final closing authority rested with field executives.

5.3 Partner-Mediated Enablement

Partner webinars and technical training provided an essential intermediate nurturing step. Cold outreach leads were invited to joint product demonstrations, followed by one-on-one partner briefings. Once end-customer interest was established, partners initiated "case-lock" opportunity registration, protecting deal priority and standardizing lead hand-over.

5.4 Data Quality & Gatekeepers

Reaching verified decision-makers presented the single greatest operational hurdle. Institutional contact lists were frequently obsolete. Efficacy improved when contact credentials were cross-referenced across corporate registries prior to calling and updated in the CRM immediately following call completion.

6. DISCUSSION & MODEL

To synthesize these empirical insights, this paper proposes the **Qualify–Enable–Hand-over (QEH) Model** for institutional B2B sales:

1. **Qualify Stage:** Focuses on rigorous contact verification, profile enrichment, and initial needs evaluation (screening for Interest, Budget, and Authority signals).
2. **Enable Stage:** Utilizes middle-funnel mechanisms—partner webinars, interactive software trials, and technical workshops—to mature lead readiness prior to formal commercial bidding.
3. **Hand-over Stage:** Executes structured CRM deal transfer to field/partner sales, incorporating formal case-locking and a systematic outcome feedback loop back to inside sales.

The QEH model extends traditional linear sales steps by establishing enablement as an explicit pre-proposal phase and enforcing closed-loop feedback between lead qualifiers and deal closers.

7. PRACTICAL RECOMMENDATIONS

Based on empirical observations, vendors should institutionalize the following practices:

- **Data Standardization:** Deploy centralized, auto-deduplicated contact management repositories.
- **Qualification Framework:** Implement standardized Interest–Budget–Authority scoring criteria.
- **Playbook Execution:** Draft unified webinar-to-training execution guidelines.
- **Feedback Integration:** Enforce monthly pipeline status exchanges between field and inside sales.



8. LIMITATIONS & FUTURE RESEARCH

This study is constrained by its single-case scope, short evaluation window (14 weeks), and focus on activity metrics rather than ultimate contract realization. Financial metrics and long-term conversion figures were unavailable. Future research should track qualified leads through multi-year closing cycles and empirically evaluate the QEH framework across healthcare and enterprise SaaS verticals.

9. CONCLUSION

Top-of-funnel institutional SaaS sales is a rigorous, data-intensive discipline characterized by low conversion yield per contact. Efficacy hinges on accurate decision-maker profiling, structured multi-touch partner engagement, and disciplined CRM logging. The QEH framework provides a practical blueprint for organizations seeking to professionalize inside-sales workflows in emerging markets.

DECLARATIONS & REFERENCES

Acknowledgements: The author thanks the inside-sales team and industry guides at InstaVC for placement mentorship.

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