TECHNOLOGY MARKETING STRATEGIES

Eliminating Leads: Migrating CRM to Support Account Based Marketing

Larry Stein

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Agenda

- ABM Overview
- Systems / Data Foundation for ABM
- Case Study: FloQast

The Marketing Disconnect

Reps Sell to Accounts, Not Leads

CFO

Company

Controller

Accounting Manager

Auditor

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Half of Marketing is Wasted

Which Half?

Wrong Geo

Wrong Persona

Wrong Level

Wrong Account

Wrong Role

Fraud / Student

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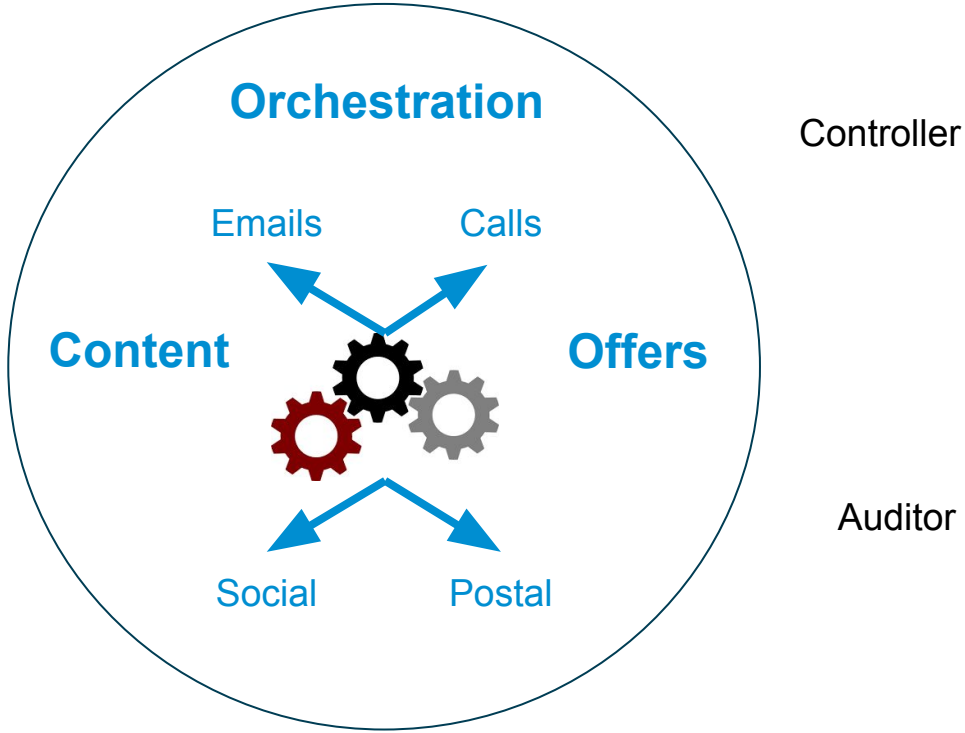
Account Based Marketing

Orchestrating Sales/Marketing: Sales Motion



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Prepping CRM for ABM:

From Leads to Accounts/Contacts

ICP Account Criteria

Tier based on:
Firmographics, Behavior, Tech Stack, etc

CRM Account Build-Out

DataFox

Create and update over time

Lead Matching & Conversion

LeanData OR Marketing Automation

Set matching rules, enrich key details, match to target personas

Account Criteria Examples:
Revenue or Employee Size, Industry, Tech Stack, Location, Marketing Team Size, Presence of Specific Role, Number of Customers, # Website Visitors, Growth Rate, B2B or B2C...

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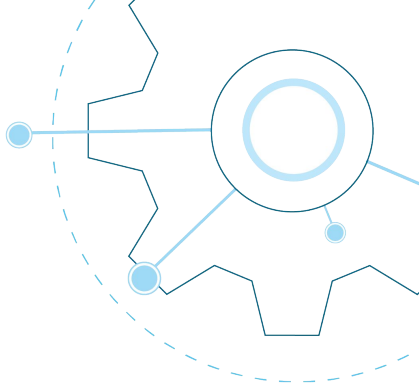
#FloQast Case Study

Challenge: Lead Flow Causing Sales Engagement Confusion

- Salesforce: Reps live in SFDC with Accounts/Contacts
- BDRs live in Outreach.io making weekly account based outreach
- BDRs Create Opps w/o complete SFDC view
- Contact Acquisition Required 20% BDR Time

FloQast CRM Migration: Step by Step



Define ICP criteria

Analysis and list building with DataFox team

Create 65,000 target Accounts

Enriched Account fields using DataFox

Deploy Account matching program

Required work email domain on forms

Convert all Leads to Contacts

Unmatched Contacts 'float' w/o Account

Real-time rep notification for matched Contacts

Future steps to build persona matching & scoring

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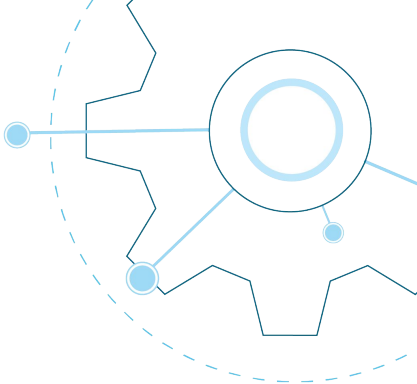
FloQast Results



⟹ Better BDR and Rep Alignment

- *Weekly Account outreach based on Contacts at Accounts*
- *Demand gen Leads show up as Contacts (w/ and w/o Account)*

⟹ Improved Marketing and Campaign Reporting

- *Simplified reporting in SFDC w/o additional tools*
- *Evaluate demand gen campaigns based on target Account impact*

⟹ Better Outreach.io Lead Visibility

- *Inbound 'Leads' show up in Outreach.io b/c they are Contacts*

⟹ Created Weekly Contact Acquisition & Sales Play

- *Saved reps time and improved consistency*

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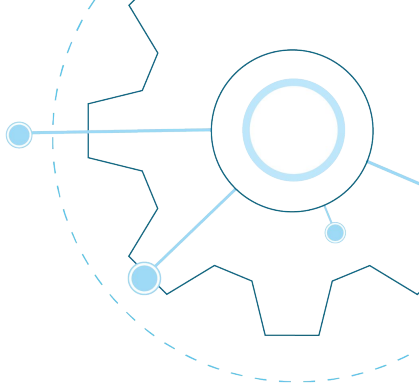
Conclusion & Recommendations



Conversion to Accounts/Contacts was smooth

- Great support from DataFox & early stage company

CRM Accounts build-out scales easily & creates focus

- Drives simplicity and accountability in future programs

Building future programs will be simplified

- Account scoring, Account alerts, Persona build-out, etc

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Questions?

Thank You