Demandbase

THE ROI Lab

for Marketers

Orchestrating Your Way to ABM Success

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Today's Agenda

- What is Orchestration?
- Use Cases
- Examples
- Self-Guided Demo

What is Orchestration?

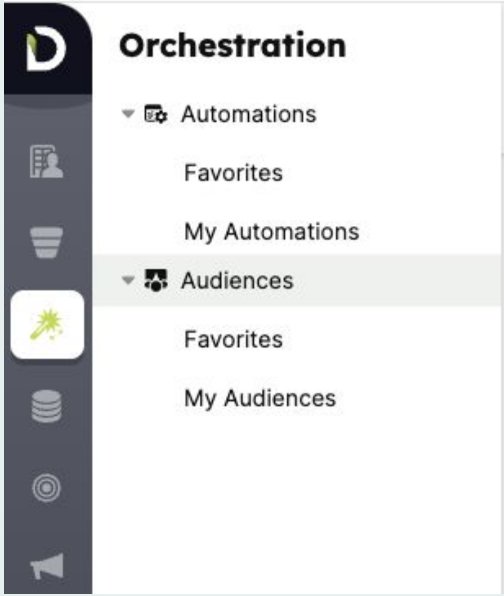
What is Orchestration?

Demandbase Orchestration allows users to bring the scale and sophistication of traditional lead-based marketing automation to the account-based marketing world.

With it, you can drive more meaningful interactions using multi-channel, cross department plays and complex audience segmentation at scale.

Two Main Features:

- Automations
  - Used for People or Accounts
  - Operationalize and automate time consuming, manual activities.
  - Create automated data management flows for People and Account records in your CRM
- Audiences
  - Used for People or Accounts
  - Dynamically add/remove People or Accounts in/from third party advertising technologies OR Eloqua/Hubspot by creating criteria from the data within ABX



Take any of this...

Data

- Predictive Scores
- Intent Behaviors
- People/Account Activity
- Website Visits
- CRM
- MAS
- Sales Inbox/Calendars

And do these...

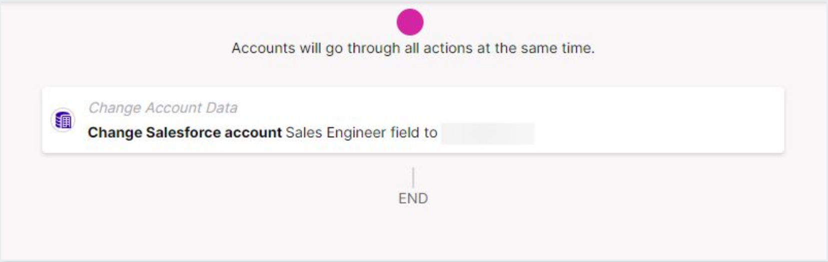
Actions

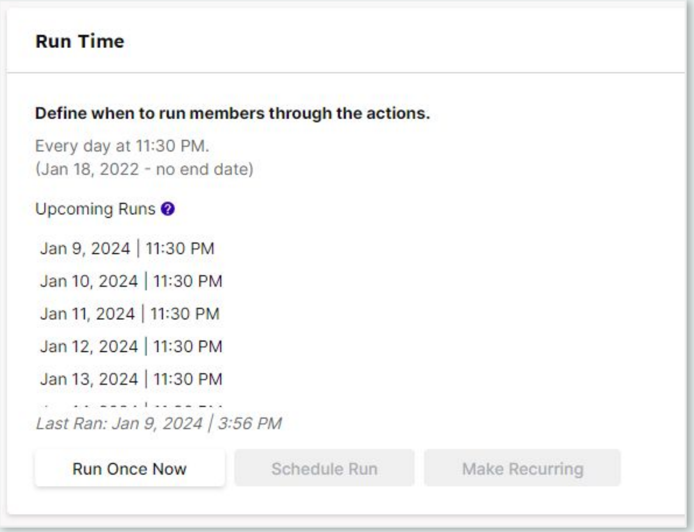
Automatically...

- Email
- 3rd Party Ad Channels
- List Building/Updates
- Sales Automation
- Direct Mail
- CRM Changes
- Sales Tasks/Alerts

Automation Steps

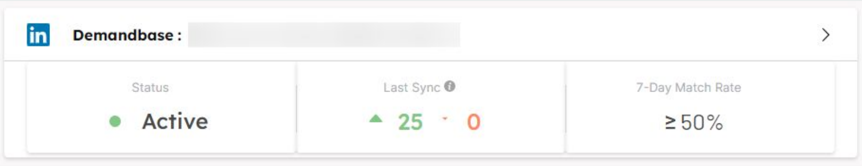
1. **Selector** – Define the accounts or people who qualify for the automation
2. **Actions** – Define what the automation does
3. **Scheduler** – When and how often the automation action occurs
4. **Member Preview** – View who would qualify for the automation if it was run at this point in time
5. **Details** – Key information and summary about the Automation
6. **History** – Members, run history and log of all actions that were run

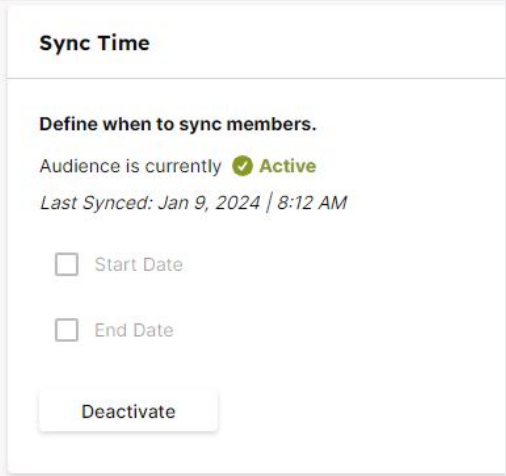




Audience Management Steps

1. **Selector –** The Selector tab is where you go to select the people or accounts you want to add to a destination
2. **Destinations –** This is the third-party destination of the people or accounts who qualify in the Selector
3. **Scheduler –** Specify when you want your audience to start and stop syncing to its destination
4. **Member Preview –** Shows you all of the people or accounts who qualify for your audience based on the Selector you have set up at this point in time
5. **Details –** Details about the audience like who created it, when it was last modified, the description and more
6. **History –** Provides you with the details of what has happened with each sync of the audience to its destination. This is where you can go to see the job and action statuses that have been completed as part of the audience sync





Use Cases

Orchestration ROI: Marketing Productivity

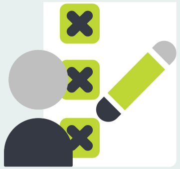
Automate tedious, but necessary tasks so you can spend more time high value projects.

20 campaigns

Avg. monthly campaigns executed across all channels *(email, webinar, direct mail, advertising, etc.)*

×

2 hours / campaign



Time spent executing repetitive tasks *(building or updating a list, triggering actions, etc.)*

=

40 hours every month

With Orchestration, save 40 hours per month on repetitive campaign building tasks

Data released by HubSpot revealed that the average marketer spends about 33% of their week completing repetitive tasks.

Orchestration Use Cases

Audience Expansion

Create rules to automatically update an existing static account list based on data changes or additional activities

Account & People Nurture

Place accounts & people in the correct nurture or drip campaigns automatically

Upsell & Cross-Sell

Automatically communicate to customers based on additional product interest

Retargeting

Create rules that dictate who qualifies for retargeting campaigns in 3rd Party Ad Channels

Reactivation Actions

Automated segmentations of accounts and people for “wake the dead” campaigns

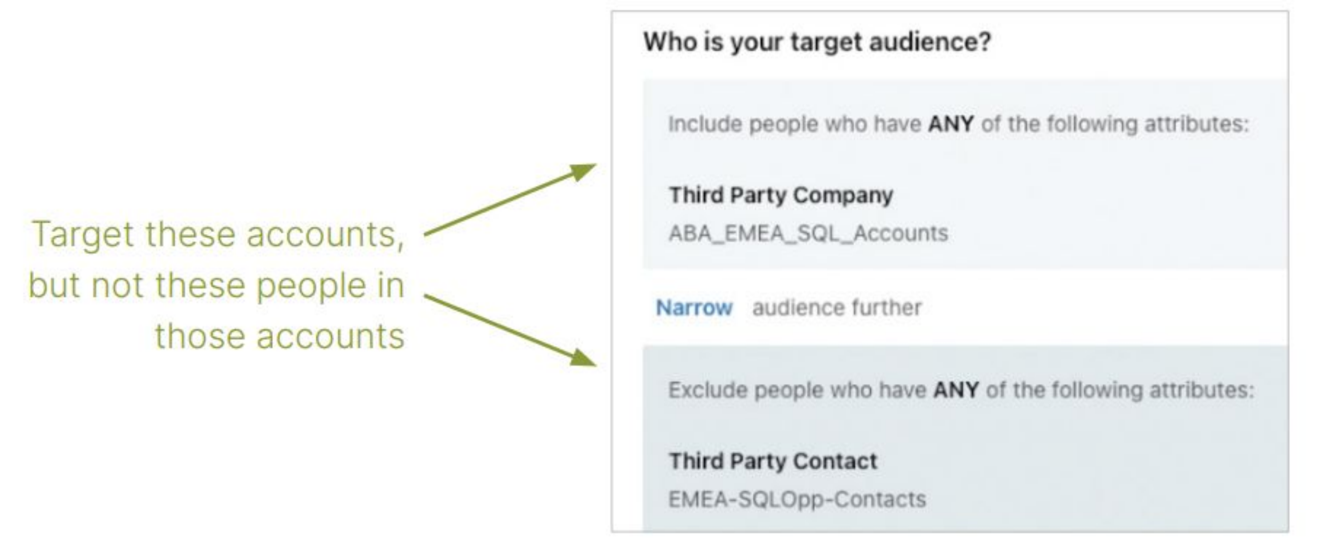
Sales Handoff

Create automated sales handoff alerts when key behaviors occur both pre and post-sales

Examples

Audiences: New Contacts from Target Accounts

One of our digital marketing team's go-to Audiences: Acquiring New Contacts for Target Accounts in the Sales Qualified or Discovery Stage of the Pipeline.



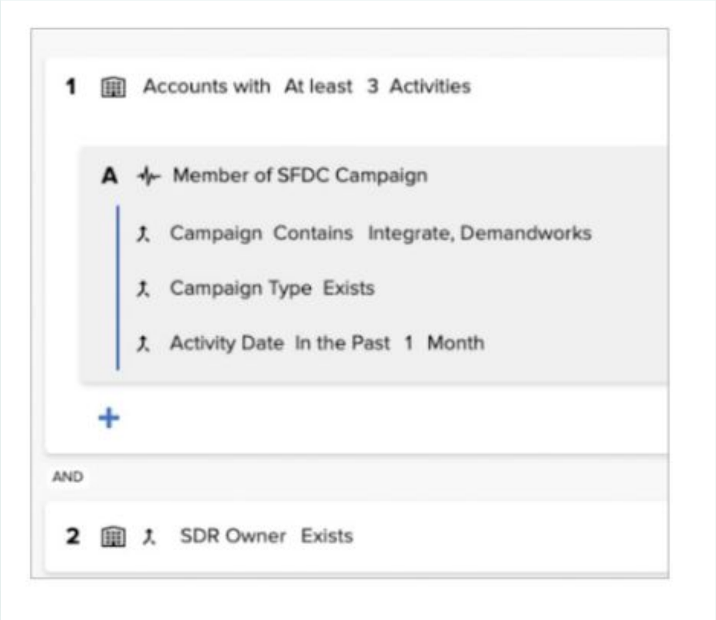
Sync both account and contact lists to LinkedIn. That way, you can suppress the current contacts in the account and focus campaign dollars exclusively on the net new contacts (and you're not wasting $$$ on contacts you already have). No wasted spend!

Audiences: Engaged Target Accounts

Another digital marketing team go-to: Reaching target accounts that are ‘Engaged’.

When you create this audience, you’ll identify the accounts from your CRM campaign with contacts engaging in content during a determined time.

You can also layer in intent to leverage the correlation between the downloaded content and intent to improve outreach.



In this example, we identified accounts from a campaign with at least three contacts that have engaged with syndicated content in the past 30 days.

Intent + Advertising

Accounts are actively searching for your solution, but you don’t know who from the account. Use advertising to build awareness and attract them to your website.

Direct Mail: Generate Further Engagement

Some prospects have been very actively engaging with your marketing, and they've just visited a high-value webpage. Engage them further with direct mail and tee-up a conversation opportunity for your SDRs.

Step 1	Step 2	Step 3	Step 4	Step 5
Prospect hits >20 mktg engagement minutes in a month AND visits high value webpage	Trigger Action for Direct Mail: send eGift card	Contact selects eGift choice from landing page and redeems gift	Alert SDR to follow up	SDR follows up

MQAs: Creating Consistency

Prospect just became an MQA? Let's make sure we get our audiences and data sorted to keep the prospect's experience consistent as they shift from marketing to sales interactions, and to maximize ad ROI.

Advanced: Beat Your Competition

Your potential and existing customers are actively researching your competitors. Use this intent-based knowledge to get ahead of the competition and engage with them at the right time with the right content.

214 Accounts with Open Opps

Target accounts in the Engaged or SQA stage with an open opp

157 Accounts researching competitors

Only includes accounts with a sales activity in the last 14 days

$23.5 Million Projected Revenue At Risk!

Based on average deal size of $150k

Serve personalized ads to the buying committee across multiple channels

Alert your account executives via Salesforce Tasks

Drop key decision makers into a personalized nurture based on the competitor they are researching

People Automation Examples

Actions to Take

- Direct into Marketing Automation
  - Add person to Marketo Smart Campaign
  - Add person to Hubspot Flow
- Indirect into Marketing Automation
  - Update Lead/Contact/SFDC Campaign Member data to activate other MAPs such as Eloqua and Pardot
- CRM
  - Change People data in SFDC
  - Convert Lead to Contact
  - Create Task in SFDC on Person record
  - Add/Remove person to/from SFDC Campaign
  - Change person status in SFDC Campaign
- Sales Engagement
  - Add to Outreach/Salesloft Sequence/Cadence
  - Remove from Outreach/Salesloft Sequence/Cadence

Account Automation Examples

Actions to Take

- Direct into Marketing Automation
  - Add People from Account into a Marketo Smart Campaign
  - Add People from Account into a Hubspot Flow
- Indirect into Marketing Automation
  - Update Lead/Contact/SFDC Campaign Member data to activate other MAPs such as Eloqua and Pardot
- CRM
  - Change Account data in SFDC
  - Create Tasks in SFDC on Account record
  - Add/Remove account to/from SFDC Campaign
- Sales Engagement
  - Add to Outreach/Salesloft Sequence/Cadence
  - Remove from Outreach/Salesloft Sequence/Cadence
- ABX (Unique to Account Automations)
  - Add to existing Static Account List in ABX
  - Remove from existing Static Account List in ABX

Customer Story | Automations

The Problem

Matillion's sales and marketing teams used different systems with different data sets that didn't talk to each other.

Marketers were manually merging the data and analyzing it to find insights that could be shared about which accounts to prioritize and how and when to engage.

MATILLION

Read the case study

The Solution

Using Demandbase firmographic, technographic, and intent data to identify and prioritize the accounts, campaigns were created to *automatically push accounts through the funnel*.

"If they are qualified or aware, they got a certain set of messaging, if they were engaged, they got another subset, if they're an opportunity or a customer, they got bottom-of-funnel messaging tailored to accelerate close rates and drive expansion,"

- *Kristin Kolb, Director of ABM at Matillion*

Demandbase Story | Audiences

The Problem

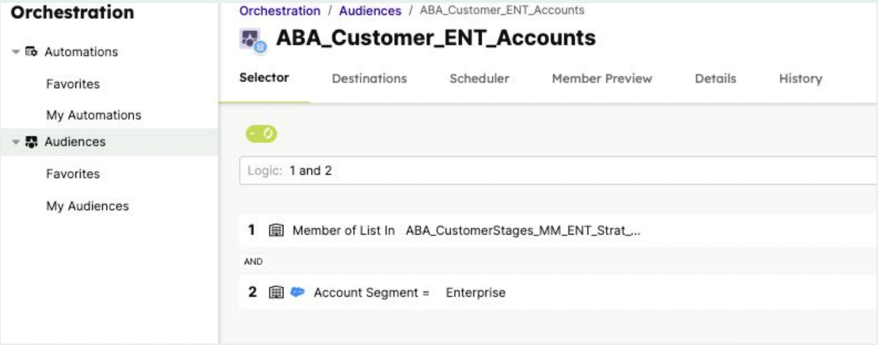
Our team has run campaigns through a variety of 3rd Party Advertising channels (LinkedIn, Twitter, Facebook, Bing), but found the options for curating audience lists within these platforms to be limiting.

It is not easy to leverage 1st party criteria like CRM or MAS data points to create lists, and exporting these lists while keeping them up to date in these platforms was laborious and not scalable.

The Solution

Our team leveraged the Audiences part of Orchestration after Demandbase One was released in which we could use selectors to incorporate data from all connected systems, and automatically push and update these lists to the leveraged destinations.

This has allowed our team to get in front of desired contacts wherever they are with efficiency.



Ready to give it a try?

Check out our Self-Guided Demo

Thank you!