

## Current state/problems (as it pertains to CM):

- Data cleanliness: right now, nearly all of our data cleansing processes are manual (via Mirabella), including lead-to-account mapping. All of our data enrichment processes are done via Clearbit. CaliberMind would allow us to level-up our data enrichment.
- Lead-level and account-level segmentation criteria is hard to maintain and use in a meaningful way - think role based campaigns at a lead-level or vertical based campaigns at an account level (and then combine the two).
  - A good example is
- Understanding people's path to purchase (or other conversion points - SQL) and how effective our content and web channels are.
  - A big portion of this is that we haven't had much data to work off of in the past, but we will going forward.
  - We are also very novice in GA / advanced BI functions. We need to up-level there.
  - We will want to use this information to inform salespeople on when their leads & more-so accounts are being active. Eventually inform them exactly when and how they should reach out.
- Account-level prioritization and scoring.
  - We've gone with very light-weight analysis and our gut so far. Sales is starting to lose faith in our tiering system.
  - We need to access data about account's tech stack and usage (MightySignal and Apptopia) in a more scalable way.

CaliberMind will allow us to:

1. Aggregate our customer data from an account-view, pulling interactions from:
  - SFDC attributes
    - Firmographic (ie. vertical or geography or account status)
    - Demographic (role or lead status or source)
    - Sales data (meetings that happened, sales emails sent)
    - Campaign membership (ie. for events attended)
  - Marketing platform
    - Email interactions
    - Form submits
    - Website activity
  - 3rd party tools
    - Google Analytics
    - Clearbit (reverse IP)
    - MightySignal & Apptopia
    - Drift
    - Terminus
2. Utilize this data to do the following:

- **Enrich our database** - get a better understanding of what information we have about the accounts in our database & fill in the white space
- **Prioritize accounts** via smarter scoring systems (may be predictive)
- **Create segments** easily (based off of lead and account level data) and dynamically update and send that data to both marketing platform and SFDC.
- **Attribution:** SFDC campaign members (default constant) - various models and ways to consume (no need for BI)

### CaliberMind Business Use Cases

|   | Use Case  | Business Value  | Success Metric  | Replacement Cost for  |
|---|---|---|---|---|
| 1 | <b>Marketing data Management:</b> acquire, transfer, format, clean, enrich, standardize, correlate, segment, add context  | Estimated at \$110K (10,000/leads/yr x \$11/bad record)   | Email deliverability, Record completeness, Record deduplication | \$8K for the year (RingLead)  |
| 2 | <b>Better segmentation and targeting</b> using account scoring, behavioral signals such as MightySignal/ Apptopia   | Up to 25% lift from Lead to MQL = \$\$\$<br>Up to 12.5% lift from MQL to SAL = \$\$\$<br>Up to 5% lift from SAL to SQL = \$\$\$ | Full funnel conversion rate                                     | Build a fully integrated stack with a shared database and a decision engine |
| 3 | <b>ABM</b><br>Lead 2 Account matching, Account scoring, lookalike accounts [account stays in the lead object, converts when it becomes an opp, and when new leads come in it gets moved to Contacts, works with Clearbit reveal to create account or at least tag the reveal stats] | Pipeline velocity, Sales conversion rate  | % Lead 2 Account Match  | \$18K (Lead Management tool)  |
| 4 | <b>Attribution</b><br>First, Last, Multi-touch  | Digital marketing optimization = \$\$\$   |   | \$15K (Attribution tool)  |

|   |   |                           |  |                                    |
|---|---|---------------------------|--|------------------------------------|
| 5 | <b>Marketing Measurement</b>  | Marketing ROI measurement |  | \$12K BI tool<br>Marketing analyst |
|   | <b>Total in Cost Savings</b><br>(Direct Replacement not including employees and build cost) |                           |  | <b>\$53,000</b>                    |
|   | <b>Total in Revenue</b><br>(Sum up lift in conversion + Digital Marketing Optimization)     |                           |  | > \$XXX,XXX                        |

KPIs:

Salesforce, AP, Google Analytics, Mighty Signal → \$1k a month for first 3 months

Data cleanliness/holistic view of account, segmentation, attribution

**1. Marketing data Management**

- a. Forcing function to get our data points aligned - mainly SFDC + Autopilot + Google Analytics (added bonus is point solution like MightySignal)
- b. Mirabella is manually maintaining the integrity of our database, this will superpower that.
- c. We can ditch Ringlead (which was just quoted at \$8K for us) for deduping

**2. Better segmentation and targeting**

- a. Because our lack of connectivity between SFDC and marketing data, segmentation has been a pain (think Mirabella creating all of those SFDC campaigns for persona types, when was the last time they were updated? Or the eComm campaign, I had to tag the accounts, pull a list manually, and vet in Excel before re-uploading to AP and sending the email)
- b. We will be able to build segments off of sales activity data (ie. pull leads that have not responded to a sales email in 3 months)
- c. CM will allow us to have one system of record to create segments, and the number of data points will be much greater.

**3. ABM**

- a. Enhanced ability to complete the view of Accounts in SFDC (“magnet” type features to pull leads onto accounts)
- b. Account scoring (eventually predictive)
- c. Lookalike account creation (based off of reverse-IP lookup with Reveal)
- d. Automate some aspects of the Reveal workflow (at least for leads that are already in our database)

**4. Attribution**

- a. Out-of-box attribution functionality, significantly more than what we have now.