Intelligent Optimization of B2B Sales and Marketing

We would like to share a brief overview of a process we have developed for B2B Lead/Opportunity/Deal Optimization. We have been using this process for over two years with some of our clients and the benefits they have garnered are outlined as well. Thank you for your interest in us and our B2B Optimization.

Data, Analysis and Fit

It all starts with your Customer Data. We have worked with a number of data bases and platforms in building this process, but the most common, for B2B clients have been, Salesforce, Pardot, SharpSpring etc..

As we generally find, there is more data/information available than is captured internally by our clients. Therefore, we fully engage additional third party firmographic data (SIC, etc.) resources. We evaluate all of the sources, through analysis and discussion with your team, determining, whether the data available, will provide incremental strength to your specific optimization process.

Once established, we determine the exact fit of the optimization to your sales and marketing strategies and tactics. On a monthly basis, the inputs to and the output from, the optimization are reviewed and discussed with your team to ensure the process is "working" as predicted.

The monthly output and results analysis are all integrated directly to your database/platform. Again, our experience has shown Salesforce and Pardot to be the most common in the marketplace today.

Benefits our clients see

1. Analytic based differentiation, allowed them to treat Leads, Opportunities and even Existing Customers in a more relevant and hence cost-effective manner.

2. The comprehensive nature of the algorithms development provided them with a level of intelligence ("what if" tool) that includes multiple factors such as; Offer, Channel, Lead Source & Campaign configurations and allowed them a higher degree of visibility into the drivers of success in their business.

3. Because the optimization process and structure is completely custom built to their business, it's level of intelligence is beyond that of any "packaged modeling software" that they had used previously. We have been told that, "Intelligent Optimization captured the uniqueness of our business".

4. The performance of their marketing efforts was incrementally increased by a number of factors:

- Product and or Service adoption.
- Decrease in what they called marketing fatigue (unopened, unsubscribes etc).
- Offer - timing and variability, was greatly simplified, yet results did not decline.

5. Management decisions were simplified and accelerated, because all of the data, from the selection of Leads, Opportunities and Existing Customers for each product and offer or message, to financial performance, solicitation history, etc. is included in the process development.

6. Management was able to foresee scale earlier and therefore manage it efficiently and effectively.

- Lead list source and selections, more effective and efficient:
- Existing sources selection criteria is assessed and optimized, to fit specific lead performance characteristics.
- Similarly, New sources are identified and then tested against criteria to determine the level of performance they provide to the pool.

7. Lead Pool quality improvement, as a result of "quantification" of the lead pools ability to provide sales growth.

Ongoing, Review and Repeat

Intelligent Optimization is a dynamic set of processes. As such, we are continually re-calibrating and adjusting the optimization based on data from your customers and results of your marketing.

We review the business objectives, products, programs etc. with your marketing team every month, including;

- Review of the entire month's implementation plan and impacts to the business
- Results from prior months and how they should be incorporated into future optimizations.