



A New Way to Uncover Pipeline: Surge Scoring



CaliberMind **Customer Story**

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— A  CaliberMind CASE STUDY

A New Way to Uncover Sales Pipeline: Surge Scoring

At a glance

NetApp collaborated with CaliberMind to develop Surge Scoring alerts, a powerful tool that helps sales teams identify early buying signals to uncover potential buyers more quickly. With Surge Scoring, sales teams can prioritize and engage with the most relevant prospects, resulting in faster pipeline growth.

Key metrics

Surge Scoring has had a significant impact on NetApp's sales and marketing efforts, enabling their sales team to identify and engage the most relevant prospects— which resulted in improved communication and better alignment on campaign strategies.

In a single quarter:



20%

target accounts surged



733

new opportunities

TIME KILLS ALL DEALS

It's a phrase often repeated by sales leadership for a good reason. Potential buyers have short attention spans, and the longer you let a lead sit, the harder it is to re-engage.

NetApp took things a step further and asked their analytics team an important question:

Can we uncover more opportunities if sales understands who is engaging with our brand and what they're interacting with before the point of qualification?

"We wanted to give the sales team a better tool than cold prospecting to build pipeline. Why not elevate the target accounts showing signs of life? We can see if accounts are active on our website, downloading assets, or performing other early buying signals. These activities may not meet the bar for a qualified lead but indicate a warm account in the aggregate," said John Schoofs, Director of Data Science & Strategy at NetApp.

Alerting sales is a balancing act. Marketers have heaps of data capturing early buying signals, but separating the wheat from the chaff can take a lot of work. It was imperative to the project's success that the signals triggering an alert were meaningful to sales.

NetApp's goal was to only elevate the most relevant prospects at the right time to their sellers, and the engagement with their brand had to be sufficient cause for a salesperson to take action.



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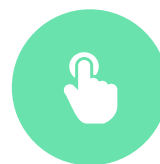
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Denver, CO, United States



**Data-Driven
Account
Identification**



**Using Only
Meaningful
Interactions**



**Elevated in a Way
that Works for
Salespeople**

AUDIENCE MANAGEMENT 101



A few truths influenced the direction of CaliberMind's Surge Scoring project with NetApp. As a rule, salespeople:

- Don't want to be distracted by a lot of low-intent or "noise"
- Only care about a subset of targets or the most ready-to-buy accounts
- Don't want to log into another system

We developed a reporting structure that only elevated the most engaged target accounts in a given salesperson's territory. To do this, we avoided promoting one-off activities with the NetApp brand. Instead, we used a scoring model to look at the aggregate of activities across every account over a limited period. What made the alerts valuable was the ability to sort and display only the companies with a change in engagement.

The result was an email delivered to each rep at the beginning of the week showcasing accounts they cared about that were proactively engaging with the NetApp brand.

It seems like a simple concept, but we were so impressed with the results that we rolled out the same functionality to the CaliberMind sales team, and it's now available to customers of our Surge Scoring product.

"A lot of the development has been a collaborative effort. My team was lucky to co-develop the feature and benefit from the functionality before it was formally released. Our CMO and Vice President of Digital championed the concept, and our CMO kicked off the program at our annual sales conference," said John Schoofs.

"It's been exciting to see a spike in communication from the sales team," John continued. "They want to know more about the campaigns and programs we run in marketing and how they can signal which subset of products a prospect is interested in. It's gratifying when a salesperson expresses value in knowing which content their account consumes."

In their words

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John Schoofs
Director of Data Science & Strategy

"Our President overseeing sales and marketing has asked to highlight surge email usage during our quarterly business reviews."

Tracy Earles
Senior Director of Marketing Analytics

"In our first quarter of surge email deployment, we identified surges in about 20% of our priority target account list. As a result, sales opened 733 new opportunities for those accounts within the same quarter."

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MARKETING & SALES WORKING TOGETHER



"In our first quarter of surge email deployment, we identified surges in about 20% of our priority target account list. As a result, sales opened 733 new opportunities for those accounts within the same quarter," reported Tracy Earles, Senior Director of Marketing Analytics at NetApp.

The real test of a new tool is whether the sales leadership team believes in the strategy.

"Our President overseeing sales and marketing has asked to highlight surge email usage during our quarterly business reviews. It's a new metric we're happy to support because he sees the value in the tool and wants the sales team to make the most of it," said Tracy. "It is extremely difficult to encourage people to look at and understand reports, but we've found a delivery mechanism for surge scoring that works for sales leadership.

"More importantly, our salespeople have seen success in uncovering more opportunities and closing them faster, which makes adoption a no-brainer."