FINALIST 2014

B2B AWARDS

HARTE HANKS

CONNECTIONS MADE
IMPACT DELIVERED

Category number: 22

Category name: Best B2B lead generation campaign

Programme/initiative name: CA Technologies Nimsoft acceleration campaign

Agency: Harte Hanks

Brand or client: CA Technologies

URL or microsite [if appropriate]: n/a

Word count: summary (190), main submission (984)

[Summary page]

Intelligent lead generation in new territories results in SAL landslide, 43% above target

Challenge

CA Technologies (CA) needed to increase revenues and market share with direct activity in nine EMEA regions.

Target accounts were considered pure 'whitespace', having virtually no CA footprint. However, they were recognised as having significant growth potential, so the stakes were high.

Solution

Harte Hanks was retained to generate sales-ready opportunities within high-value target accounts across the territories.

The agency composed and trained a team of highly experienced sales and teleprospecting marketers to scope out relevant prospect contacts, engage them in business-need level discussions then generate demand and tangible opportunities, working within CA's preferred tools (salesforce.com and Marketo).

Opportunities were followed up directly by CA, with close support from Harte Hanks to maximise return and closed business.

Results

In the first nine months the campaign yielded:

- **488 sales ready leads** [target: 478]
- **479 sales accepted leads** [target: 334]
- **99% conversion rate** to SALs [target rate: 70%]
- **ROI of 8:1** in nine months

This initial success has led to the campaign being extended for a further 12+ months. [190 words]

[Main submission]

About the client company

CA Technologies is one of the largest independent software corporations in the world. This entry focuses on lead generation for the firm's Nimsoft Monitor.

Nimsoft offers a complete monitoring solution for IT environments. It addresses known challenges, delivering benefits surrounding business enablement and alignment to boost performance and reliability.

Strategy – broader business issues the company is facing

CA had ambitious pan-EMEA targets for Nimsoft. But without an established footprint with key accounts, a ground-up approach was needed to:

1. Increase sales and revenues in target regions (UK & Ireland, France, Norway, Denmark, Austria, Switzerland, Spain, Czech Republic, Poland)
2. Increase awareness and take-up of Nimsoft
3. Increase penetration in 'whitespace' accounts
4. Deliver better sales/marketing integration

Whitespace accounts either had incumbent competitive solutions or no solution at all. CA hadn't sold to them previously and wanted to get in the door.

Historically there was little sales/marketing interaction: both did their own thing, activity was disjointed and it was difficult to get any definitive idea of marketing ROI. This was a major driver for the programme.

Harte Hanks was appointed to support CA. The agency proposed a multi-centre, multi-lingual team of experienced marketers to engage with target organisations and generate tangible demand and specific opportunities, working closely with the CA sales team including regular on-site presence at CA's HQ.

Objectives of the campaign

The objective was to deliver sales ready leads (SRLs) and subsequent sales accepted leads (SALs) over a 9 month period:

- SRL target: 478
- SAL target: 334 (70% of sales ready lead target)

To achieve this, Harte Hanks set out to engage directly with prospects, and specifically:

- Build rapport, cultivate relationships and provide education on CA brand and products
- Gather profiling intelligence to scope potential opportunities
- Identify decision-maker and influencer contacts, gaining opt-in to marketing communications
- Identify projects and qualify leads as sales opportunities for CA
- Deliver value propositions to influence the end-user to engage with CA sales or channel partners
- Identify and qualify leads
- Promote CA social channels, events and other initiatives to end-user customers and prospects

The target audience

Target organisations were enterprise level (5000+ employees) with multiple EMEA sites.

The audience was IT decision makers with responsibility for data centre and IT operational monitoring of infrastructure.

Since targets were mostly whitespace, the first task was to research and discover relevant contacts: individuals responsible for ‘IT monitoring and operations’. This responsibility didn’t always translate into job titles, so the potential audience included Director of IT, CTO, Head of Monitoring, Head of Data Centre Applications.

Media, channels or techniques used

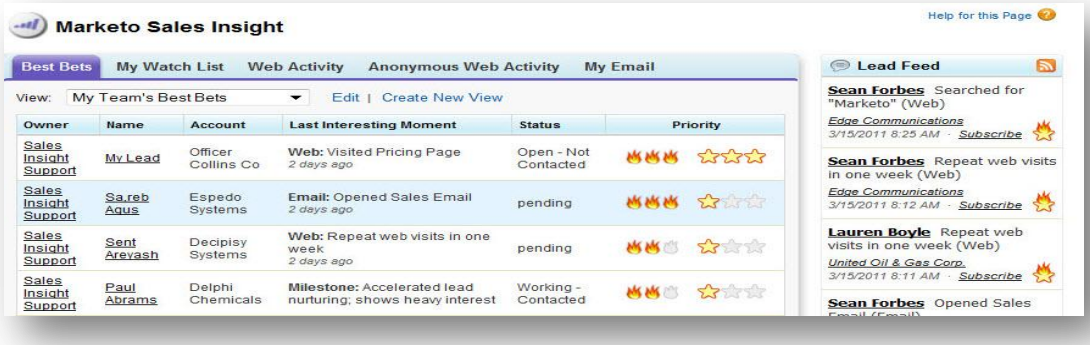
Teleprospecting & telemarketing

The primary channel was direct engagement via teleprospecting and telemarketing outreach. Our multi-lingual marketers, known as 'TPRs' (Teleprospecting Reps), worked in CA's instances of salesforce.com and Marketo to provide real-time progress and status updates of every direct prospect engagement.



Marketo provided raw lead queues and an overview of activity and engagement between each prospect and CA.

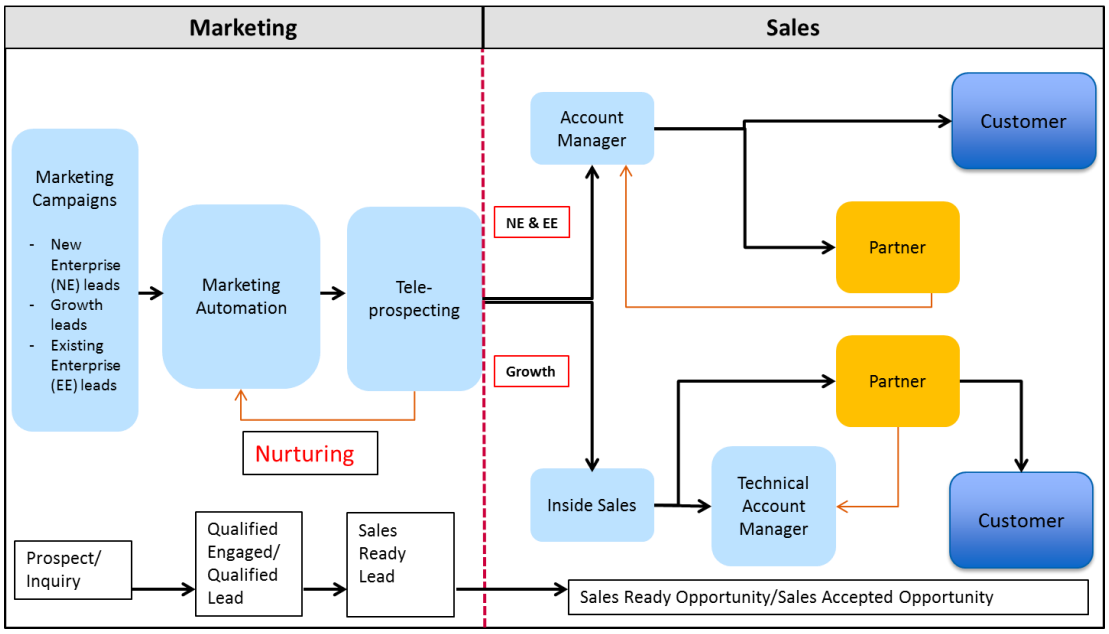
To be considered for direct telephone engagement, a prospect has to achieve a Marketo score of 60. Scores are accumulated via interaction with CA marketing activity, e.g. receive an email as part of a campaign (10 points), click through to a CA website (15 points) etc.



Our team then called assigned target prospects meeting the threshold and conducted business-need-level conversations to:

1. Understand the organisation's current IT infrastructure and monitoring environment
2. Deliver the Nimsoft value propositions
3. Qualify each engagement, update Marketo and salesforce.com and broadly follow process a, b or c:
    a. Create a BANT-qualified SRL where appropriate and assign to CA account manager, including full write-up of conversation in salesforce.com with specific, mandatory information agreed in advance
    b. Arrange further calls and/or information to be provided to target and categorise as 'nurture' to be followed up
    c. Close out opportunity as 'no current interest'
4. Undertake direct 'warm' lead handover to ensure full transfer of SRL takes place and CA account manager has all information required to accept and convert the SRL.

Marketing-to-sales handover was a defined critical success factor, so CA and Harte Hanks devised the following process involving regular dialogue between the TPR and Sales, usually on-site at CA:



Initial TPR sales-ready lead qualification is performed by the TPR Program Manager and Local Field Marketing. Local Field Marketing then facilitates lead transfer to Sales in a joint effort with the TPR Program Manager via weekly calls.

Each SRL receives a warm ‘hand-shake’ prior to transfer. In addition, each transfer is accompanied by a copy of the Sales Acceptance Process, with the Programme Manager and Field Marketing CC’d.

Finally, weekly salesforce.com reporting on SRLs, SAOs, Inquiries and Pipe (Country, Segment, Sales Play) vs. targets is provided to track overall progress.

Online marketing campaign

Harte Hanks further supported teleprospecting by designing, creating and executing a multi-touch online marketing campaign. This involved mapping typical buyer journey phases (Inspire, Educate, Rationalise and Purchase) then delivering appropriate messages via relevant content such as:

- Whitepapers
- Solution videos and testimonials
- Targeted emails
- Master campaign microsite
- Online infographic

The campaign included internal reference content for the TPRs including a battlecard (describing the campaign, audience, pain points, USPs etc.) and CA solution data sheets.

Activity was tracked in Marketo throughout campaign duration, with interaction and leads followed up directly by Harte Hanks.

Timescales of the campaign

April – June 2013: planning

July 2013 – March 2014: execution

Budgets

These details were provided to judges in the original submission but are commercially sensitive and therefore confidential.

Results

- Decrease in untouched leads to average of 10% of total SRLs generated (previously over 50%)
- Decrease in closed/lost leads to 25% of total SALs generated (previously in excess of 70%)

- Total SRLs: 488 (target: 478)
- **Total SALs: 479 (43% higher than the 334 target)**
- Increase in conversion-to-pipeline (quoted opportunities) from 10% to above 30%
- **Size of sales pipeline** (quoted opportunities registered in salesforce.com) These details were provided to judges in the original submission but are commercially sensitive and therefore confidential.

Client testimonial

Harte Hanks' intelligent approach to lead generation enabled us to penetrate the nine EMEA regions earmarked as having high growth potential quickly and effectively. The team met our SRL target in just nine months, but more importantly the conversion of these to SALs was far higher than we anticipated. This is testament to the strategic expertise of the agency and the calibre of individuals on the teleprospecting team. The fact that this was achieved in regions where we had no existing presence deserves special recognition. We now have a strong EMEA foothold which we will further build on with Harte Hanks' support over the coming months.

Frank Willig, Teleprospecting Manager, CA Technologies

[984 words excluding headings]

Submission ends