

Customer Case Study

Situation



RedCloud, a venture-backed technology start-up, needed to aggressively generate leads, expand its pipeline and grow revenue for its cloud-based, building access control platform. Given its 100-percent indirect channel sales model and entry-level CRM system, RedCloud's sales team had limited visibility into its overall sales pipeline. Additionally, the marketing team needed a lead management and marketing automation platform to capture, nurture and generate qualified leads to support their growing nationwide network of channel partners and drive more opportunities for the sales team.

Solution



Allinio, working in parallel with RedCloud's B2B marketing agency and certified Salesforce CRM firm, conducted a Lead Management Workshop to implement a comprehensive lead management process across RedCloud's entire marketing funnel and sales pipeline. Allinio helped RedCloud define in-depth buyer personas, lead scoring models and lead qualification stages, with agreed upon metrics between the VP's of Sales and Marketing. Allinio also contributed to the selection, configuration and implementation of the Spark by Marketo marketing automation platform and Salesforce.com CRM system.

Results



RedCloud's new marketing automation and CRM platforms were operational within 120 days, through a coordinated implementation between all vendors. Thousands of customer and prospect lead records were standardized, cleansed and migrated to Spark™ and synchronized bi-directionally with Salesforce.com to provide company-wide visibility into the status of leads within the marketing funnel and sales pipeline. Custom e-mail and landing page templates were integrated with RedCloud's web site, along with a lead scoring model to automate nurturing campaigns and demand generation efforts, for evaluation with newly-defined marketing metrics.



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Customer Case Study - Detail

RedCloud

Building a Foundation for Sales & Marketing

RedCloud is a provider of cloud-based, physical access control and building security solutions, which had recently completed a comprehensive integrated B2B marketing and re-branding effort. Given its 100-percent indirect channel sales model and entry-level CRM system, RedCloud's sales team had limited visibility into its overall sales pipeline. Additionally, the marketing team needed a lead management and marketing automation platform to capture, nurture and generate qualified leads to support their growing nationwide network of channel partners and drive opportunities for sales.

Working in parallel with RedCloud's marketing agency, CreatiVerge (www.creativerge.net), and certified Salesforce.com CRM firm, Avidon (www.avidon.com), Allinio defined platform requirements, evaluated marketing automation systems, and conducted a Lead Management Workshop to implement a comprehensive lead management process across RedCloud's entire marketing funnel and sales pipeline. Allinio helped RedCloud define in-depth buyer personas, lead scoring models and lead qualification stages, with agreed upon metrics between the VP's of Sales and Marketing. Allinio also contributed to the selection, configuration and implementation of the Spark by Marketo marketing automation platform and Salesforce.com CRM.

Given RedCloud's need to manage leads for its nationwide network of channel partners – as well as end user customers – Allinio and Avidon worked to simplify a complex lead management process. A detailed flow chart documented how RedCloud's marketing, sales and operations teams handle lead generation, qualification and conversion, account and opportunity creation, pipeline and revenue forecasts and ultimately product fulfillment. Avidon's expertise in Salesforce.com automation workflows, data requirements and approval processes resulted in a CRM solution customized to work with RedCloud's indirect, channel-based sales model, instead of forcing RedCloud to adapt operations to a direct sales model.

Generating Marketing Results within 120 Days

RedCloud's new marketing automation platform and CRM system was operational within 120 days, through a coordinated implementation between all vendors. Thousands of customer and prospect lead records were standardized, cleansed, segmented and migrated to Spark and synchronized bi-directionally with Salesforce.com to provide company-wide visibility into lead status in the marketing funnel and sales pipeline.

CreatiVerge developed custom e-mail and landing page templates, which were integrated with RedCloud's web site, along with the behavioral lead scoring that Allinio had implemented to automate nurturing campaigns and demand generation efforts. A series of trigger campaigns were configured to support a multi-faceted whitepaper download campaign across several lead source channels, as well as trade show follow-up campaigns to determine product interest.

Additionally, Allinio and CreatiVerge worked with RedCloud to establish baseline metrics to evaluate the success of ongoing marketing activities, including the quantity and quality of leads generated from each marketing program. Moving forward, RedCloud will have the ability to provide accurate quarterly marketing forecasts, determine which marketing activities had the greatest impact on revenue and adjust budget priorities accordingly.

About Allinio (www.allinio.com)

Allinio is a platform-neutral, marketing automation services company dedicated to helping firms evaluate, select, configure, implement and support cloud-based marketing and sales technology infrastructure to accelerate revenue growth and maximize marketing ROI.

Contact Allinio today at 410-929-7644 or www.allinio.com to better align your marketing and sales departments, automate lead management and qualification processes and effectively capture, analyze and act upon the behavioral data that ultimately drives revenue.

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