2020 OpsStars Awards

Presented by LeanData

Award-Winning
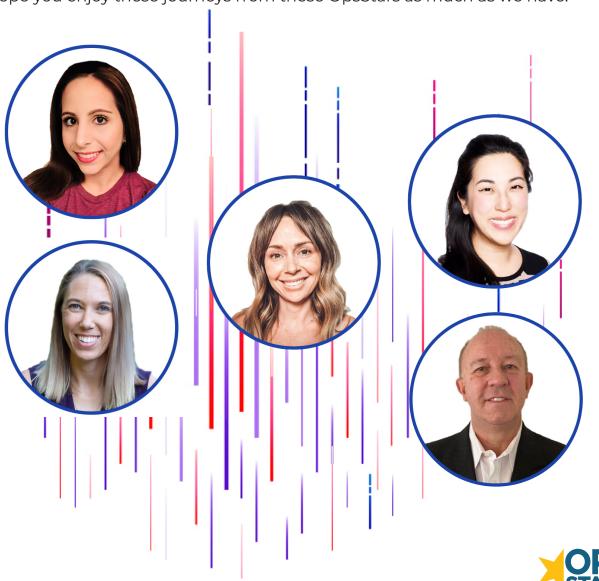# Ops Stories

OPS STARS

by LeanData

OpsStars Awards

Recognizing strategic Operations professionals and their ground-breaking innovations to drive pipeline, revenue and propel their company forward in 2020.

We asked Operations teams and professionals to share how they have operationalized processes and strategies to overcome the challenges 2020 has brought with successful outcomes, and we were amazed to see what came back. The challenge for us was determining those who stood up and stood out a little more than the rest.

This collection highlights the stories from the 2020 Award Winners. You can see how they uniquely identified opportunities and solved challenges to find success. We hope you enjoy these journeys from these OpsStars as much as we have.

2020 OpsStars Awards

Presented by LeanData

Contents

OPS STARS The Rise Of Ops

by LeanData

Most Cutting-Edge Ops Program

An individual or team responsible for driving quantifiable results for their organization through operational excellence.

Anaplan

The Challenge

Anaplan lacked alignment around how to best serve its customers to drive strong retention and successful expansion. The organization's biggest challenge involved driving a mindset shift within its field teams around customer health and adoption, and identifying which actionable metrics the company should rally around.

The Operational Approach

Anaplan's Operations team started by establishing a definition of data-driven, quantifiable customer adoption metrics, working cross-functionally to ensure the result would resonate on a company-wide level.

Then, the team began to draw on other relevant data from Salesforce and Splunk (e.g., annual recurring revenue data, pipeline expansion data, and usage data) to develop a rich and robust illustration of the customer landscape on adoption.

In Anaplan platform, the team built a technical infrastructure to ensure its account teams could easily leverage the data. Now, the organization's Sales and Customer Success teams set collaborative, bottom-up targets to drive adoption improvements, with top-down review and buy-in.

The Impact

The bottom-up target setting process was hugely welcomed by Anaplan's field teams, and gave a high level of confidence to the top tier executives because the metrics were backed up by a clear process to achieve a realistic goal in improving customer health.

Anaplan's adoption improvement efforts have significantly impacted both annual recurring revenue and pipeline for the company.

"Our efforts have brought about a true best practice to align on one source of truth for gauging customer adoption. We're looking into providing our partner ecosystem access to this metric so we can scale adoption improvement efforts beyond Anaplan."

- Lindsey Oh, Director, Customer Operations, Anaplan

OPS STARS
by LeanData

Highest ROI Program of the Year

An individual or team on the leading edge of innovation in go-to-market operations resulting in real business impact. This award recognizes the trailblazers constantly pushing the envelope and not afraid of new approaches or experimentation with processes, org design, or their tech stack.

CYBRARY

The Challenge

At one point in 2019, Cybrary took almost a year to assign a backlog of leads to their sales team. They receive up to 20,000 leads per week but reviewing and routing those leads was a manual process that required exporting from Marketo, importing into Salesforce, then manually assigning to a rep. Both Marketing and Sales leadership knew that this process had a direct impact on revenue and needed to be addressed.

The Operational Approach

The Marketing and Sales teams partnered to address this process. First, they set up a sync between Marketo and Salesforce - a huge first step, but the leads continued to back up in Salesforce queues because that continued to be a manual process that lived with the Director of Sales Development and often fell down her list of priorities. Even worse, there was no way to easily see which leads were assigned to which sales team member and whether or not they had been contacted. They knew they needed automation and visibility if they were going to make an impact.

Next, they implemented LeanData to automate lead routing. Now they strategically route their leads based on lead scores to round robin pools and have even implemented SLAs to ensure hot leads are touched in 20 minutes or less - a huge change from the previous backlog. By automating routing and providing visibility, they can now hold their teams accountable and easily report up to their executive team.

The Impact

Within one quarter of optimizing their lead processes, Cybrary saw significant ROI and major impact on the business:

- 64% increase in completed product demos

- 45% more opportunities created

- 133% increase in new pipeline

- 38% growth in number of closed won opportunities

- 98% increase in revenue from closed won opportunities

All of us at Cybrary are held accountable to revenue. It was very clear in our quarterly review that the improved process led to large increases in demos booked and pipeline created.

- Cami Ragano, Senior Director, Business Marketing, Cybray

Most Scalable Lead Management Program of the Year

A team that significantly scaled lead management capabilities to support rapid business growth.

zoom

The Challenge

Custom code for lead routing lived within Zoom's Salesforce instance and was inflexible and slowed Ops processes down, which was especially problematic because the company had been in a high growth phase for the past several years and needed to scale. Any changes to lead routing required developer resources, which meant the Sales Operations team wasn't able to easily try new lead management initiatives or fine tune processes.

The Operational Approach

They knew they needed a lead management solution that could help the company scale quickly to keep up with its rapid growth, and they decided to use LeanData. They had an aggressive timeline of three months (January to March 2020) to implement the software. During that time, Zoom worked closely with LeanData to build and execute an implementation strategy. Meanwhile, COVID-19 hadn't been declared a pandemic yet, but the situation was evolving quickly.

They deployed LeanData on March 4, right when offices around the globe started to work from home and people were looking for and using Zoom more than ever. This solution has made both processes faster and more accurate, enabling Zoom to formalize processes, and mature and scale its entire sales function.

The Zoom team also made the investment to get LeanData Routing Certified, ensuring that everyone involved had confidence in managing the new solution.

The Impact

Since implementing LeanData, leads are getting routed to the right reps more quickly than ever before.

With more control over the process, they can be more agile. Changes that used to take months now take one week or less to implement.

Ultimately Zoom has been able to significantly scale their lead management capabilities to manage unexpected and explosive lead volume from around the world in 2020.

"As our go-to-market approach changes, we'll be able to adapt our lead assignment rules to meet any change in our strategy. I don't know that we had the certainty before LeanData to make that statement. Now from an operational standpoint, we do."

- Michael Fedynyshyn, Sr. Manager, Sales Operations & Strategy, Zoom

Go-to-Market Agility Powered by Operational Excellence

The COVID-19 pandemic and its economic impact required many Sales and Marketing leaders to rapidly reinvent both short- and long-term go-to-market strategies. This award recognizes one operations team and its standout ability to help an organization nimbly pivot to successfully meet new market realities.

The Challenge

The transition of events due to COVID-19 changed the way Duo Security qualified event leads. They relied on one-to-one conversations in the past, which virtual events don't always allow for. The criteria and process for how leads should be processed in this new environment was a challenge.

The Operational Approach

Duo Security's Marketing Operations team collaborated with the Marketing leadership, Field Marketing and Sales to strategize on ways to ensure that virtual events would be as successful as in-person events. They got creative and relied on their Martech stack.

First, to qualify leads from virtual events, they would run leads through a series of qualifiers in 6sense and only assign leads that were most likely "in market" and ready to have conversation with sales.

To identify existing customers, they used LeanData to match leads to accounts. They enabled their Sales team to identify in Salesforce whether a person matched to a customer account or if they were simply a prospect. This was a huge win because it was an easy step to work into Duo Security's process, and it was simple for the Sales team to refer to the information in Salesforce.

The Impact

The biggest takeaway from Duo Security's go-to-market initiative is the sheer volume of qualified leads the company has supplied to its Sales team -- a significant increase YOY.

Duo Security was very fortunate to be able to not only uphold the anticipated lead volume for its Sales team, but to increase the volume during a global pandemic.

"I believe our go-to-market approach is in line with best practices for operations because we were thoughtful and thorough, and we leaned on various systems including LeanData to execute our plan. This experience showed us that we're capable of adapting on the fly as our business needs shift."

- Chelsie Cauthon, Senior Marketing Operations Specialist, Duo Security

**Lead Management Program
Transformation of the Year**

An operations-led initiative that drove transformational change in one
organization's lead management engine across people, processes, and technology.

Amplify.

The Challenge

Amplify's Marketing team generated plenty of leads for the Sales team, but the two departments didn't have a common definition of a qualified lead. In addition, dirty data made the follow-up process time consuming for the Sales team.

The organization didn't have clear answers to basic questions such as how long it took to contact leads, whether they were slipping through the cracks, or whether MQLs were converting at acceptable rates. And, neither team owned these problems.

The Operational Approach

Amplify created a cross-functional task force to address its challenges. They created a new function, Marketing Optimization, that was directly responsible for the hand off of leads from Marketing to Sales and hired an experienced SFDC Admin on the Business Systems team who would ensure changes made sense in the overall ecosystem.

They created standing meetings between the Sales and Marketing teams to look at the data together to create a culture of accountability. And the Marketing team shadowed key sales reps and SDRs to understand the main pain points that they were facing in the day to day so they could be addressed.

Once the teams were aligned and the problem was clear, the challenge was figuring out how to remove the technical barriers that were preventing reps from responding to leads quickly. They knew they needed a routing system in place and ultimately decided that LeanData could best solve its core issue of routing leads and contacts to the right reps in real time.

The Impact

Amplify has reduced the time it takes to assign and contact leads by 84%. The company's conversion rate from MQL to SQL has increased from 12% to 17%, above its target of 15%. The organization has also exceeded its goal for Marketing-driven bookings by 38%.

Having established relationships across various internal teams, as well as having the right tools, enabled Amplify to pivot quickly during the pandemic. The company has also noticed a shift in how its Sales and Marketing teams work together, driven by data, which has led to greater trust between the departments.

"As we designed our new lead management program, we always asked what was in the best interest of our prospects. That enabled us to move away from defensive postures to an open discussion around how we could make the process better."

- Christine Leonard, Director of Marketing Optimization, Amplify Education

Most Impactful Analytics Program of the Year

An individual or team using data and analytics to power attribution or engagement programs with real ROI.

eightfold.ai

The Challenge

Eightfold AI's Marketing team wanted to better understand their ROI and to know which accounts were engaging with its marketing campaigns, something that seemed simple, but ended up being a challenging task. With data in Salesforce and Marketo, they had to pull multiple reports to paint a picture of engagement. They wanted clear reporting on the impact of their Marketing efforts without having to run manual reports. Attribution also had to be simple, clear and accurate to be to be trusted by Sales and the rest of organization. Eightfold needed one source of truth of marketing data across the company.

The Operational Approach

They explored a few Engagement and Attribution solutions and eventually landed on LeanData. The teams already trusted LeanData for matching leads to accounts and routing them correctly. And, more importantly, all of the data and reporting lived in Salesforce where both Sales and Marketing teams live, so they could all rely on a single source of truth. Sales and Marketing first had to align on what defines a marketing engagement. Then they built out dashboards with this data, so everyone has visibility into which accounts are engaging and in which channels. By implementing first touch, multi touch, and last touch Attribution models, they also have data-driven insights into the customer journey and where to focus their efforts. Marketing also can now better understand which programs are driving both pipeline and revenue, which has been invaluable for planning and decision making.

"As we scale up pipeline, LeanData Analytics helps us easily communicate the impact that we're driving.

- Dexter Hart, Head of Marketing Operations, Eightfold

The Impact

Implementing new tools and streamlined reporting has helped Eightfold create a common language of account engagement shared by the Marketing and Sales teams. Reporting that was manual, now is in dashboards. And because all the data lives in Salesforce, the Sales team also has greater visibility into marketing activities. That transparency not only builds trust, but helps focus Sales and Sales Development outreach efforts. Their original marketing plan for 2020 included a big focus on field events, but when the pandemic hit, they quickly pivoted to virtual events and additional digital marketing. Attribution has helped them validate the impact of new channels and provided the data to tell the story. Bringing together those pieces has helped them drive massive pipeline growth in the midst of the pandemic.

"If you're in the business of driving growth, it's critical to be able to look across all of your opportunities and actually see the programs and content that are fueling the deals."

- Carlos Tobon, Director of Demand Generation, Eightfold

OPS STARS

by LeanData

ABM Program of the Year

An organization or team exemplifying a best-practices approach to account-centric programs with proven success.

Linked **in** ®

The Challenge

LinkedIn was trying to secure more mid-market and enterprise accounts, but the company lacked a targeted, high-touch, uniform approach to get in front of these accounts. The organization was running disparate marketing campaigns across a variety of channels, which weren't anchored around a consistent message.

LinkedIn also didn't have any existing account-based marketing (ABM) systems or processes in place to help with account scoring and tagging, and was relying on manipulating its Salesforce instance to track data on a per account basis. The company needed to develop an ABM strategy and break down internal silos to support the effort, as well as craft a singular message to share with target accounts.

The Operational Approach

LinkedIn created a task force to align on key messaging for its ABM campaign, and sought feedback from sales reps. The company solved many of its challenges through extensive pre-planning, such as communicating with stakeholders about expectations, and staying organized by creating a calendar of account touchpoints for its Marketing and Sales teams to use collaboratively.

In addition, LinkedIn retooled its Salesforce instance to track relevant data. Tagging various accounts and contacts to the company's ABM effort made it easy for LinkedIn to capture and measure results.

Finally, by using LeanData Engagement, LinkedIn gained visibility into the complete picture of marketing and sales touches at the account level, enabling the company to gage the effectiveness of its coordinated efforts. LeanData's multi-touch attribution model also allows LinkedIn to see how much pipeline its ABM program drives.

The Impact

LinkedIn's results have been extremely positive so far. In the two rounds of account-based marketing that the company has performed to date, LinkedIn has exceeded its pipeline goal for ABM by nearly 400% on both occasions.

"Getting buy-in from Sales and being clear about the data we wanted to capture was integral to our success. Now, we're undertaking an exercise to see how our non-ABM accounts compare to our ABM accounts, which will help us derive the true impact of our ABM campaign."

- Angela Lee, Senior Marketing Manager, LinkedIn

OpsStar of the Year

Our annual "best in show" award which recognizes the standout achievements or contributions to the industry of one Ops professional.

"I want to continue to become a leader in the ops space and team up with other amazing operations professionals. I love operations, I want to see it in the spotlight, and I want to help make that happen."

- Kimberly Galitz, Marketing Operations Manager, Bandwidth

bandwidth

LeanData: How would you describe the role of operations?

Kimberly: Operations is a critical part of every organization. It's the behind-the-scenes engine that ensures a company's processes and solutions all work for its marketing and sales functions.

LeanData: What drives you in your operations work?

Kimberly: I'm so passionate about helping organizations and people understand the importance of operations, but also about helping others in the operations community expand their knowledge, careers, and most importantly, their confidence.

I presented on the significance of a Marketing Operations role at Bandwidth, and have now moved into that role. I want to help architect our tools and structure our team in a way that demonstrates the value of operations. Marketing Automation roles are often forced to cover both marketing and campaign operations. Depending on the size of a company, that can lead to burnout and delays in implementations, and can prevent teams from reaching their goals.

LeanData: How would you like to see the operations function evolve?

Kimberly: There is no MOPs degree at university (yet). There aren't even many entry level positions. Operations is a role you sort of "fall into", which is why it's essential for managers to talk about building out these positions. Although it's a critical function, operations doesn't often make it into hiring plans.

LeanData: What's next for you?

Kimberly: I'm hoping to team up with other OpsStars and spread the word about the importance of operations. In the past year, I've become a Marketo Champion, Certified LeanData Expert, Bizible User Group Leader, and an overall bigger geek about operations. It was so impactful for me to increase my knowledge, and to help my community of operations friends grow their skills. I will continue to speak about the significance of MarTech and champion the software that I use every day.

OPS STARS

by LeanData

2020 OpsStars Awards
Presented by LeanData

Thank you for your interest in our
2020 OpsStars Awards Winners!
To learn more about OpsStars,
visit **ops-stars.com**.

About LeanData

LeanData provides the market's first Revenue Operations platform for accelerating revenue and growth in B2B. Standing at the center of Salesforce CRM, LeanData's Lead-to-Account Matching, Routing, Engagement and Marketing Attribution solutions orchestrate and automate the go-to-market process to help revenue teams close more deals and drive more revenue, faster. **Contact Us Today**

OPS STARS
by LeanData