



## 2021 OpsStars Awards

Presented  
by LeanData

## Digital Transformation Award

An individual, team or organization that has led a digital transformation initiative, introducing digital technology into an area of the business, changing how you operate and deliver value to internal teams and customers.

### The Winner



### The Challenge

SAE International wanted to scale its account-based marketing (ABM) programs but struggled to achieve the internal communication, streamlined data, and technical architecture needed to measure and execute on account-based sales and marketing.

The organization grappled with deeply siloed teams, lack of leadership buy-in, and disparate databases. Without a cohesive, omnichannel account experience, sales reps overlapped on multiple accounts. SAE was ready for a complete digital transformation.

### The Operational Approach

Working with B2B Fusion consultants, SAE International began by cleaning up its data, streamlining its databases, and determining which systems would act as source of truth for which account level.

SAE set up business and dataflows using LeanData to drive insights, automate routing, and ensure sales and marketing teams looked at and shared accurate data. New dashboards provided up-to-date information to increase the success of targeted campaigns and benefit employees' own bottom lines.

SAE also introduced Drift's chatbot solution to help customers access information quickly and Demandbase intent data technology to create an account journey and improve alignment between marketing and sales. Together, these complementary ABM solution providers brought SAE's many processes and systems into sync.

B2B Fusion and SAE created training programs to ensure sales and marketing teams had the same comfort and ability to navigate the new platforms. SAE simultaneously worked with executive leaders to not only gain buy-in for the transformation, but to drive it as a priority.

### Operational Results

SAE International's digital transformation achieved several goals:

- Unified departments now look at the same datasets to evaluate success, with regular touchpoints
- SAE has implemented a new service-level agreement and lead management process
- Account engagement has improved; follow-up with target accounts is consistent
- Sales, marketing, and executive teams schedule regular internal conversations about successes and failures
- Marketing qualified accounts are now handed over to sales

**“The big game changer happened when we brought in LeanData, which helped us automate routing, use lead-to-lead contact and conversion, and use opportunity objects to deliver multiple opportunities on the same account for each business unit.”**

- Scott Filip, Sales and Marketing  
Operations Manager