



## OpsStar of the Year

This annual “best in show” award recognizes the standout achievements or contributions to the industry of one Ops professional.

### THE WINNER



**Rachel Godfrey**

Senior Marketing Operations Manager



### The Challenge

With employee count more than doubling in one year, marketing and sales operations at BambooHR needed to run faster than ever. However, legacy processes were holding them back from making quick changes, testing new plays, and fixing issues that impacted revenue.

BambooHR had five different platforms involved in creating leads, routing leads, and enrolling them into sales cadences. This ineffective system caused reassignments, lead leakage, and negatively impacted speed-to-lead. This created a major barrier to iterating and optimizing processes.

### The Operational Approach

Implementing an ABX strategy required a shift in mindset and Rachel knew the most successful conversion rates happen when a lead is contacted within 5 minutes, so the first goal was to increase how fast SDRs followed up. First, she revised lead processing activities in Marketo so that leads were normalized more quickly. Then once the lead is ready, LeanData will assign it to the right rep and send them a Slack notification. Service Level Agreements (SLAs) are in place and reports are set up for SDR managers to have visibility.

Next, expansion plays were revamped ahead of a new product launch. A custom object and APEX code were replaced with LeanData. Where leads previously came from multiple sources,

Rachel worked with over 30 contributors to consolidate all expansion lead generation inputs to funnel through Marketo. LeanData now looks at open opportunities, recent opportunities, recent activities and more to assign customer leads to the correct rep.

With LeanData scheduled-routing mining batches running nightly, new leads are constantly added to the pipeline. Auto-mined leads are processed through the LeanData-Salesloft integration node, automatically adding the leads to Salesloft cadences, saving time across sales, sales leadership and operations teams.

### Operational Results

As a result of BambooHR's operational changes, lead management processes have greatly improved. Multiple inefficiencies have been removed, saving time and opportunity cost, making better use of their sales reps' time, managers' time, and a better buying experience. Further, the BambooHR Operations team can test and make changes quickly without having to involve internal Salesforce Engineers and complex APEX code.

Other measurable outcomes include:

- Speed to lead improvement from 33 to 10 minutes (70% reduction)
- Increased conversion potential of 200,000 MQLs since launch
- Decreased manual work for SDRs resulting in \$283,500 in time saved
- Decreased troubleshooting for Operations team resulting in \$75,600 in time saved
- Decreased time spent lead mining for Sales teams resulting in \$211,575 in time saved

“I work hard to make sure we are using every aspect of our platforms possible. It's a great feeling when you can help stakeholders' ideas come to life using technology you already have. We have a lot of complex rules and routing, but who doesn't? The important thing is to make your processes easily adjustable for future scenarios and be able to handle unlimited lead flow.”

Rachel Godfrey, Senior Marketing Operations Manager, BambooHR