Reachdesk



Thrive or die in the age of the customer

In case you haven't heard by now, today's B2B buyers expect an outstanding customer experience.

They value the experience you provide throughout the entire buyer journey as much as the service or product you offer. And a lot of the issues that are poisoning your go-to-market (GTM) strategy likely stem from your struggle to meet your buyers' growing expectations.

80% of customers value experience just as much as products and services

Salesforce

60% of buyers expect companies to understand their needs and expectations

Salesforce



Is this you at the moment?

You're struggling to do more with less under growing pressure and trying to compete in an increasingly crowded market.

Low pipeline

You struggle to generate pipeline because the digital overload most B2B buyers are inundated by every day results in lower response rates from prospects.

Increased customer churn

Customers are more likely to leave you because they're not adopting your products and are not getting the engagement they need.

Losing to competitors

Competitors who are able to differentiate and create a smoother customer experience snatch deals from you.

Wasting your team's time and energy

Your teams are not able to focus on the strategic initiatives that really matter because they're busy producing more noise.



Do you wish you looked a bit more like this?

You're focusing on creating an outstanding experience for your prospects and customers by delivering moments of genuine human connection.

High customer and prospect engagement

You find moments that matter across the buyer journey and create meaningful connections with prospects and customers. This leads to higher response rates and more pipeline and revenue.

Healthy, happy people

You give your team tools that save them time and bring creativity and joy to their work.

Better alignment between teams

You unite the efforts of your sales, marketing and customer success teams under a shared strategy.

Strong customer advocates

You build strong relationships with your customers which helps you boost renewals and growth opportunities.



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What's poisoning your go-to-market strategy?

Digital noise

Every day, B2B buyers are bombarded with hundreds of emails and ads. Digital and in-person events have become generic and easily forgettable and the level of competition grows by the day. All this means we have to do more to create a connection and drive engagement.

60% of B2B tech buyers are millennials, a generation that is twice as likely to discover products online than older generations

TrustRadius

Poor customer experience

Today's customers are informed and connected. They have greater access to information than ever before and they have high expectations for their customer experience. If you don't provide a great customer experience, you risk blending into the background and being easily forgotten.

80% of B2B customers expect an experience that is as good or better than B2C

PWC

Teams working in silos

Your GTM team faces the growing pressure of market conditions and the challenges of stretched budgets and resources. Without a strategy that brings your entire GTM team together behind a shared goal, you risk falling short of your business goals and burning your team out.



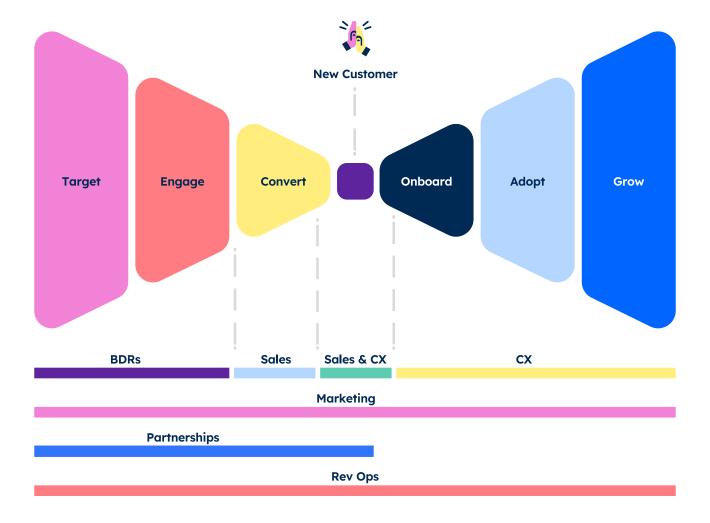


Allbound engagement

The antidote to underperforming Go-to-market strategies

The marketing and sales teams of the future work as one unit as one GTM team and treat outbound and inbound as one motion. We're all bound to the same goals and targets so it only makes

sense to find a way of working together towards our shared goal. What if we told you can take inbound and outbound and tie them together with a bowtie?





Allbound is a new methodology for B2B GTM teams that looks at inbound and outbound as a single motion working towards shared revenue goals. Allbound brings demand generation, ABM, sales, partnerships, growth and customer success together under one motion that can remedy underperformance across the board through allbound engagement tactics.

Allbound engagement is a new way to respond to the growing expectations of

customers and thrive in the age of the customer. The allbound engagement methodology helps you identify moments that matter as a team and create experiences that generate results across the full customer lifecycle. Now you can engage prospects and customers and stand out from the crowd using gifting, direct mail, virtual experiences, event packs and swag.





Who is allbound engagement for?

Allbound engagement is for every B2B GTM team that wants to win and thrive in the age of the customer. Regardless of what stage your business is at and how mature your strategy is, you can use the allbound engagement methodology to identify key moments in your buyer's journey that can be optimized for a better, smoother customer experience. Whether your current strategy is underperforming or you want to get even further ahead of competitors, allbound engagement offers you ways to improve and drive better business results than ever before.





How get started with allbound engagement

O1 Assemble your team

Allbound engagement is a methodology that activates your entire GTM team so driving alignment between your sales, marketing and customer success teams is key. Information should flow both from the top down and from the

bottom up so that everyone involved has a complete picture of the goals you're trying to achieve and the obstacles you have to overcome. Each team member has an equally important part to play in delivering the best possible customer journey. Here are some of the key players and the roles they need to play:

Senior sales, marketing and customer success leaders

Your senior sales, marketing and customer success leaders will be the driving force behind the strategy. Their job is to make sure your strategy is informed by high-level business goals such as revenue and pipeline targets and everyone involved understands how that translates into their day-to-day.

Marketing team

Your marketing team will be executing a lot of your allbound engagement strategy and they are going to be tasked with educating internally on what the strategy entails and managing the day-to-day of running your campaigns. They are going to be working closely with sales, BDRs and CS across all initiatives.

Business development representatives

BDRs are often the first point of contact for your potential customers, so in order to deliver a consistently amazing experience, it's essential that their outreach and process is synchronized with every subsequent step in the customer's journey.



Business development leaders

BD leaders such as BDR managers are essential to making sure senior leadership understands the challenges their teams are facing, and those challenges are reflected in their strategic decisions. Equally, they should be able to translate high-level goals into tangible goals for their team, such as the number of opportunities generated, number of meetings booked, flip rates, annual recurring revenue (ARR) generated and individual BDR activity targets.

Customer success managers

CS managers are your GTM team's direct connection to customers and are responsible for passing valuable insights and feedback to the rest of the team that will inform your allbound engagement strategy – from your customer's current challenges and blockers, to questions about your product and services.

Account executives

AEs have a crucial role to play in welcoming new customers and ensuring a smooth transition for the CS team. They should be able to communicate the problems a new customer is looking to solve and the goals they want to achieve to the CSM to ensure customers are off to the best possible start.

Account managers

Ideally, AMs will be working alongside CSMs to monitor the health of the customer's account and identify opportunities for growth and cross-selling. The more you engage with the customer, the more opportunities and connections you will be able to spot.

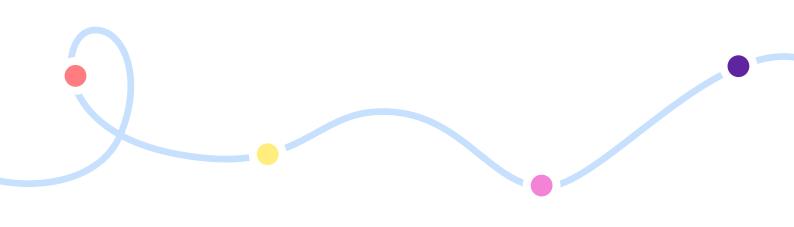


Partner marketing

Whether you have a designated partnerships team or an individual who is responsible for driving revenue from partnerships, their role is to amplify the effectiveness of an allbound strategy by creating joint value propositions with strategic partners and leveraging each other's strengths and brand recognition. This collaborative approach amplifies engagement efforts, expands reach, and provides a comprehensive solution to effectively engage customers and prospects throughout their journey. Any partnership marketing opportunities and co-marketing campaigns need to align to the allbound engagement strategy, share the same messages and work towards the same goals.

Revenue operations

Like any strategy, allbound engagement works best when it's based on solid data. Revenue operations can provide the most accurate and timely insights on trends in the market, opportunities for improving your sales and marketing process, and reporting on revenue goals. The role of revenue operations is to provide a single view of revenue impacts shared between sales, marketing, customer success and finance. Having the support of your RevOps teams as part of your allbound engagement strategy throughout the entire revenue cycle will help you generate more consistent and predictable growth.





Identify the moments where you're struggling

The start of every new strategy involves a preliminary research phase that will shape your approach and tactics down the road. When it comes to allbound engagement, it's important to look at the buyer's journey in its entirety and identify where your most acute pain points are.

Dive into your data and identify the main blockers in your customer journey.

Are you struggling to generate pipeline with digital only methods? Do prospects keep ghosting your sales team? Are your close rates keeping you awake at night? Or perhaps your win rates against the competition make your eyes water? Is there more you can be doing to drive growth from your current customers? Pick three to four moments in the buyer's journey where improvements will have the most significant impact on your bottom line.

Here are some common pain points that you can address with allbound engagement tactics:

Underperforming digital channels
 Poor email response rates
 High meeting no-show rates
 Low event attendance
 Slow-moving sales cycles
 Slow customer adoption
 Unresponsive customers
 Dissatisfied customers
 Customer churn

Our tip here is to choose only a handful to begin with. Remember, everything could always be better. It's about choosing those that can be quickly turned around without too much hassle.

Once you've chosen your pain points, it's then about the plan of attack. You

want to avoid shooting in the dark, so when building your plan, you should look to get your hands on as much data as possible. This may seem daunting, but most of us are sitting on a wealth of data that we either don't know about, or don't know how to unlock.

How to use data to pave the way to success

As we mentioned, you will need to dive into some data to not only identify the right moments in your strategy where you can improve performance, but also to inform the approach for those moments. Here are some of the different types of data you can look into and what they can tell you.

First party data

Your own website traffic and engagement data is a great place to start when creating a more personalized experience for your prospects and customers. Platforms like <u>Dealfront</u> and <u>Zoominfo</u> can be helpful in making better use of your own data. You can use any data you collect about your website visitors such as industry, job title, or location to segment your audience and create personalized web pages and targeted email campaigns, for example.

Second party data

Second party data from your strategic partners and platforms like <u>G2</u> and <u>Capterra</u> is a great way to enrich your existing audience and widen your reach. With a platform like <u>Crossbeam</u>, you can identify the overlap between your partner's target audience and yours, and single out shared prospects and customers, which allows you to create highly targeted co-marketing campaigns.

Third party data

Leveraging third party data from providers such as <u>Cognism</u>, <u>Demandbase</u>, and <u>6sense</u> is a great way to enrich your first party data with intent data and create timely and highly-personalized marketing messages and campaigns. Third party data providers can also provide intelligence on target accounts who are engaging with the websites of your competitors, giving you a chance to proactively expand your reach to new potential customers.



Further reading:

How to drive pipeline with Reachdesk and 6sense

How to drive pipeline with Reachdesk and Demandbase

Use those different data sources to identify the right moments to reach out and use them as triggers for your outreach. Here are some examples:

Job change on LinkedIn

A prospect's new role could be a good excuse to get in touch with them for the first time. You're likely not going to be the only person trying to get their attention at this time, so make sure you stand out by sending them a celebratory gift to congratulate them on the new role.

A prospect engages with your content

Whether they've just downloaded one of your whitepapers or they've visited your product pages multiple times, these are signs that they're interested in what you have to offer. Reach out to them and offer to answer any questions they may have on the content and send them a coffee voucher to enjoy while browsing it.

A prospect requests a demo

If someone is ready to see your product or solution in action, the chances are they've already done a lot of research and want to get a sense of what working with you would be like. Make the right impression and improve your meeting show rates by sending a meeting reminder an hour before the demo with a lunch or coffee voucher for them to enjoy after the meeting.



A prospect signs up for your marketing event

After the prospect registers for your webinar or in-person event, send them a reminder email and a lunch voucher a few hours before it's scheduled to begin.

A lead reaches a specific lead score (or 6QA if you're a 6sense user)

Once a prospect has had a certain number of engagements with your brand and content and they're deemed interested enough in your solution, it's a great opportunity to show them you appreciate their interest with a personalized message and a gift. For more ideas, read our guide on https://doi.org/10.1001/journal.com/ and a gift. For more ideas, read our guide on how to drive pipeline with 6sense and Reachdesk.

All the great campaign ideas above can be automated with a solution like Reachdesk.



Get creative and personal

When we say personalization is critical to an effective allbound engagement strategy, we're not joking. By now you should've guessed that we don't only mean addressing someone by their name in your email outreach. True personalization comes from researching the challenges the prospect or customer is facing and the goals they have.

Whether that insight comes from a marketing intelligence platform or from the research your BDRs are doing, it should be at the heart of your messaging. Insert relevant references to personal information such as hobbies, interests or likes.

Nearly **69%** of business leaders are increasing their investment in personalization despite challenging economic headwinds.

Segment

62% of business leaders cite improved customer retention as a benefit of personalization efforts

<u>Segment</u>

Read more on the topic:

How to build personalization into your sales outreach
The marketer's guide to the modern B2B buyer's journey
How to build a winning B2B sales sequence



Make the most of your existing tech stack

Now that you've assembled your team correctly, identified the moments to improve, sourced data to follow instead of intuition and have come to understand the power of personalization, it's time to insert the latter into your execution. This is where you'll need to lean on the tools and technology you have available.

Even though technology can definitely help your allbound engagement strategy run more smoothly, a fancy tech stack is not a requirement to make allbound engagement work. You can get started with just your CRM, basic marketing automation functionality and a good data provider.

As long as your entire GTM team is aligned on the strategy and goals and is regularly communicating their learnings with each other, you're in a good position to make improvements on the experience you're delivering to your customers across the entire buyer's journey.

Regardless of whether you have an account-based marketing (ABM) strategy in place or even tools that support ABM initiatives such as Demandbase, 6sense or Terminus, you should be able to identify the companies you'd like to work with and engage them in a meaningful way.

For those of you who have a more advanced tech stack in place, here are some of the tools you will find useful in your allbound engagement strategy...

Display platform: i.e. Terminus, Demandbase, 6sense, Rollworks, Metadata

Content marketing platform: i.e. Uberflip, Pathfactory

Sales automation tools: i.e. Outreach, Salesloft

Meeting booking tools: i.e. Chili Piper, Calendly

Data analytics/ICP targeting/Engagement scoring: i.e. 6sense, Demandbase, Terminus

Data providers: i.e. Cognism, Lusha, Apollo, ZoomInfo, 6sense

Allbound engagement: i.e. Reachdesk

Content experience tools: i.e. Ceros, Turtl, Navattic

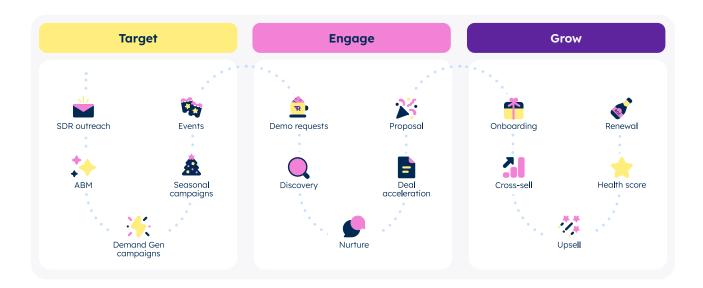
Chatbot: i.e. Qualified, Drift, HubSpot

Interactive demo tools: i.e. Navattic

The allbound engagement playbook

Once you've identified the moments in your buyer's journey that you want to focus your efforts on, it's time to brainstorm some ideas on ways to introduce new and memorable

touch points that will help propel conversations. Here are some of moments you can focus on and ideas for tactics you can try...







Target

SDR outreach

Challenge: Low response rates and ghosting

Goal: Re-engage and revive pipeline

Integrations: Salesloft, Outreach, Chili Piper

How Reachdesk customers do it:



Gifting has helped me to be creative with my outreach and the personalization a gift adds has taken my sales messages to the next level.

Read the story

Lars RoschmannSenior BDR, **Screenloop**

+14% meeting attendance rate

Get the sales development gifting playbook



Target

ABM

Challenge: Get the attention of decision makers

Goal: Increase close rates

Integrations: 6sense, Demandbase, Terminus, Bombora

How Reachdesk customers do it:



Reachdesk has been an invaluable tool in helping us accelerate our ABM program. It's a must-have for any marketers wishing to cut through the noise and engage their prospects in a far more compelling and effective way.

Read the story

Matthew Robinson
Marketing Director EMEA & APAC,
Contentsquare

+25% close rate

Get the ABX gifting playbook





Target

Demand generation campaigns

Challenge: Low conversion from digital channels

Goal: Boost conversion rates from paid social

Campaign idea: Give your LinkedIn sponsored posts for helpful content a boost by sending a coffee voucher to enjoy with their ebook or research paper.

Gift type: eGift

Integrations: Salesforce, HubSpot, Marketo

How Reachdesk customers do it:



Reachdesk has opened our eyes to just how many opportunities there are to connect with prospects and build relationships.

Read the story

Luke FaggUK Team Lead, Field Marketing **CoachHub**

+25% MQL to SQL conversion rate



Target

Seasonal campaigns

Challenge: Time-consuming gifting campaigns

Goal: Save time and resources

Campaign idea: Don't waste time juggling vendors, packing, posting and tracking everything manually. Streamline your one-off and seasonal gifting campaigns with Reachdesk.

Integrations: Salesforce, HubSpot, Marketo

How Reachdesk customers do it:



What used to take hours can now be done in minutes using Reachdesk.

Read the story

Charlie Oldham
Marketing Director,
Agillic







Target

Events

Challenge: Low event attendance and engagement

Goal: Drive attendance and conversion

Campaign idea: Send a voucher for a free lunch or refreshing drink with your email reminder a day before a webinar or virtual event. Having a treat to look forward to can work miracles in getting people even more excited about the event.

Integrations: Salesforce, HubSpot, Marketo

How Reachdesk customers do it:



People can get event or webinar fatigue. Direct mail provides a different type of interaction. Whether you're a recipient or a sender, you get a different type of satisfaction from a successful direct mail drop.

Read the story

Vasileios Kospano Senior Field Marketing Manager Lacework

+75% webinar attendance

Get the field marketing gifting playbook



Convert

Demo requests

Challenge: Meeting no shows

Goal: Accelerate pipeline

Campaign idea: Give your demo conversations a caffeine kick by sending prospects a luxury coffee gift set, including a personalized mug and gourmet beans to enjoy before their demo.

Gift type: Marketplace gift

Integrations: Salesloft, Outreach, Chili Piper

How Reachdesk customers do it:



When we first started using Reachdesk, we saw a 15% increase in meeting show rates. More shows equals more deals so that directly impacts our bottom line.

Read the story

Kiera Griffis Marketing Campaign Manager, **Divvy**



Convert

Discovery

Challenge: Meeting no shows

Goal: Engage decision-makers in discovery calls

Campaign idea: Make sure an upcoming discovery call is firmly on your prospect's radar. Treat them to a coffee or lunch voucher either before the

discovery call or as a thank-you after the meeting.

Gift type: eGift

Integrations: Salesloft, Outreach, Chili Piper

How Reachdesk customers do it:



Using Reachdesk in my sales process has directly impacted \$250K worth of closed-won revenue resulting in a 100X ROI. I couldn't live without it. It helps me build stronger champions and close bigger deals, faster!

Read the story

Jack Neicho
SMB Account Executive EMEA,
Salesloft



Convert

Nurture

Challenge: Bad timing
Goal: Stay top of mind

Campaign idea: Add an eGift to your nurture email cadences to stand out in your prospects' crowded inboxes. A coffee voucher to go with a good piece of content is always a nice touch.

Gift type: eGift

Integrations: Salesloft, Outreach
How Reachdesk customers do it:



Sending prospects a coffee before a meeting has been super valuable for us. It's not a flashy gift, but it's been part of every campaign we've run and it's always well received.

Read the story

Luke FaggUK Team Lead, Field Marketing **CoachHub**



Convert

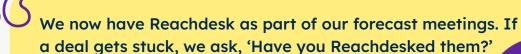
Deal acceleration

Challenge: Deals get stuck

Goal: Revive stalled deals

Campaign idea: Re-engage champions by sending a personalized gift based on their likes and interests. If they're a *Star Wars* fan, send them some memorabilia from the show. Or use our Amazon Rainmaker tool to find them something special and send over the recommendation along with an Amazon voucher to spend.

Integrations: Salesloft, Outreach
How Reachdesk customers do it:



Read the story

Lars RoschmannSenior BDR, **Screenloop**

Hokodo sees 3X more likely to close deals when using gifting



Convert

Proposal

Challenge: Deals get stuck

Goal: Get execs up to speed

Campaign idea: Help execs catch up by sending them a short summary of the calls they've missed so far along with a sweet treat they can enjoy while they get up to speed.

Gift type: Physical gift

How Reachdesk customers do it:

Once we introduced the gifting playbook across the entire customer lifecycle, we saw it really impacted our sales velocity and deals in which we used gifting are 3X more likely to close.

Read the story

Nasri EL-Sayegh VP Revenue, Hokodo





Grow

Onboarding

Challenge: Slow adoption

Goal: Boost customer adoption

Campaign idea: Gamify the user experience by setting milestones to reach when using your product or service and reward your customers every time they achieve one. This will create excitement from the very beginning and help users feel rewarded and appreciated.

Gift type: Physical gift/ eGift

Integrations: HubSpot, Marketo, Salesforce

How Reachdesk customers do it:



It's been great to create a personalized touch to thank customers and to encourage them to continue to use our product.

Read the story

Dani Mortimer, Customer Success Manager, Divvy



Grow

Cross-sell

Challenge: Hard to reach stakeholders/new teams

Goal: Engage stakeholders

Campaign idea: Research your key stakeholders and send them a thoughtful, personalized gift to introduce yourself. This will go a long way when it comes to cross-sell conversations.

Gift type: Physical gift/ eGift

Integrations: Salesforce





Challenge: Hard-to-reach key stakeholders/new teams

Goal: Engage stakeholders

Campaign idea: Send your stakeholder content that touches on the product and problems you've already discussed, but also highlights additional pain points that an "upsold" product could solve. Sweeten the deal by sending them a snack they can enjoy while reading your content.

Gift type: Physical gift/eGift **Integrations:** Salesforce

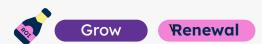


Challenge: Low adoption/ Ghosting

Goal: Improve customer experience

Campaign idea: If you're struggling to re-engage a customer, take advantage of big calendar events to grab their attention. Whether it's Valentine's Day, Halloween, or Christmas, go all out with a colorful direct mail delivery that shows you're thinking of them and ready to take their user experience to the next level.

Gift type: Physical gift **Integrations:** Salesforce



Challenge: No exec buy-in at renewal stage / churn

Goal: Drive brand loyalty

Campaign idea: Send customers a bottle of champagne or their favorite treat after they sign their renewal to celebrate your continued partnership. You can also celebrate smaller steps whenever they add more users or start using more of your product with a personalized eGift.

Gift type: Physical gift **Integrations:** Salesforce

Get more gifting inspiration in our corporate gifting guide for Q4



How do you know if allbound engagement is working?

Find the right attribution model for your business

Perhaps one of the most challenging and critical projects for every highperforming GTM team is finding the attribution model that allows fair and accurate reporting and meaningful goal-setting. Here are some of the most common attribution models and how they can help you measure the impact of your allbound engagement efforts.

Single-touch attribution

Whether first or last-touch attribution, a single-touch attribution means 100% of the credit goes to a single touchpoint. Single-touch attribution usually works best for businesses with a short sales cycle that focus on driving volume.

Multi-touch attribution

Linear, U-shaped, W-shaped, time-decay – there are many different types of multi-touch attribution models with varying levels of complexity. Most enterprise businesses choose multi-touch attribution to account for their longer sales cycles and more complex buyer journeys.

Custom multi-touch attribution

As they mature, most teams find that what works best is an attribution model that's unique to their own business. This is what we've found to work best for us. At Reachdesk, we look at four main primary sources – inbound, outbound (BDR), partner, and self-generated (AE-driven). We assign the sources at the first-touch and the last-touch, crediting the last-touch source to the opportunity. To further understand the impacts we drive, the first and last-source both have a sub-source such as sales touches, or marketing campaign engagements. In marketing, we look at the sub-source when marketing is not credited for the opportunity to see how marketing influences opportunity creation.



Select your pipeline measurement metrics

At a high level, a GTM team is collectively responsible for opening and then closing pipeline.

Having a shared list of metrics to measure pipeline performance is key to making better decisions about your strategy as a team.

Questions to answer:

- What's marketing's contribution to pipeline?
- ✓ What are sales self-generating?
- ✓ What is the average deal size for each sales and marketing?
- ✓ How are partnerships contributing to pipeline growth?
- How many of the opportunities generated were touched by both marketing and sales?
- How are sales, marketing and partnerships working together towards pipeline goals?

Keep an eye on pipeline velocity

One of the main goals of your allbound engagement strategy will be to accelerate your sales pipeline so pipeline velocity is a key metric to watch.

Knowing your pipeline velocity helps you increase the revenue flow into your business every day and allows you to make timely adjustments.

Questions to answer:

- How many qualified opportunities do you generate?
- ✓ What is your win rate?
- ✓ What is your average deal value?
- What is the average sales cycle length?

How to calculate pipeline velocity

Number of qualified opportunities

X win rate

X average deal value

average sales cycle length

Metrics to watch

Here are some of the metrics you can use to measure the success of your strategy...

Target

- Opportunities generated
- ✓ Value of qualified pipeline
- ✓ Value of all pipeline generated
- ✓ Social reach
- ✓ Brand perception

Engage

- Meetings booked
- ✓ Number of accounts reached and engaged
- ✓ Number of stakeholders within each account engaged
- ✓ Win rate
- Annual contract value
- Customer acquisition cost

Grow

- Customer Net Promoter Score
- Customer retention rate
- Product adoption rate
- Renewal rate
- Customer testimonials, reviews and case studies



Success stories from Reachdesk customers



14% increase in meeting attendance



15% increase in meeting show rate



160% increase in response rate quarter over quarter



1.1M pipeline generated



Reputation \$6M of pipeline influenced

HOKODO

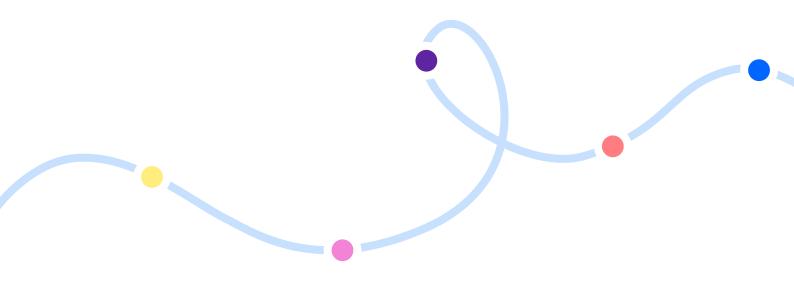
deals 3x more likely to close using gifting



Conclusion

In the age of the customer, savvy businesses know that delivering an exceptional customer experience every day is a requirement, not a nice-to-have. Allbound engagement gives you the methodology and tools to activate your entire GTM team and deliver moments

that matter, regardless of what stage you're in. Add highly personalized and data-driven gifting to the mix, and you'll have an unstoppable GTM strategy that will set you light-years ahead of your competitors.





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