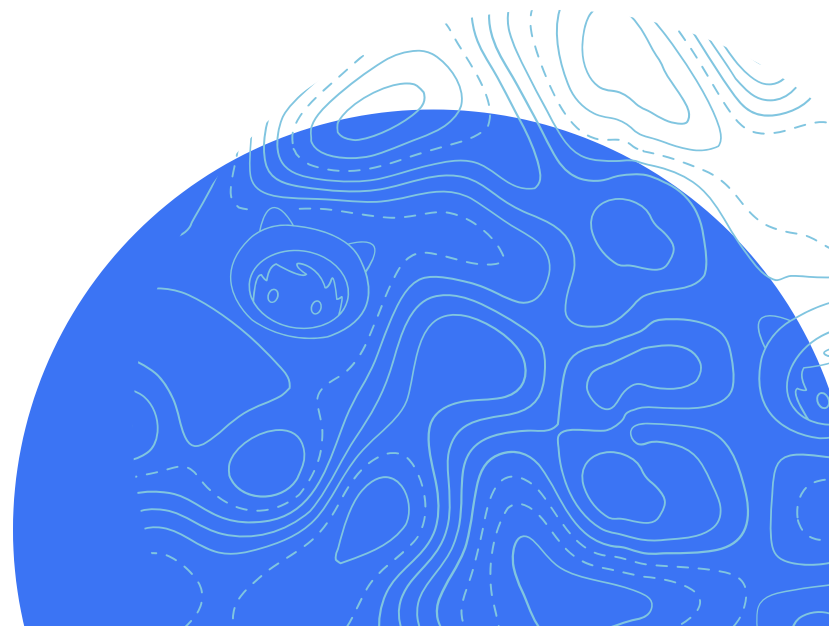# Trailblazers
in
CONVERSATIONAL
MARKETING

How marketing leaders use Conversational Marketing
to blaze new trails with modern buyer engagement

QUALIFIED

Table of contents

Introduction

The past year has brought *massive* change to the B2B buying landscape.

B2C brands like Netflix, Spotify, and Amazon are setting a new standard for cutting-edge, personalized buying experiences. As a result, expectations for highly-curated customer experiences are reshaping the way B2B businesses engage with their buyers.

As businesses around the world scramble to compete for their buyers attention in an increasingly-digital world, savvy marketing leaders have turned to Conversational Marketing to break through the noise and deliver the personalized experiences B2B buyers demand.

This book highlights the journeys of these Conversational Marketing Trailblazers. Dive into their stories to learn about:

- The challenges marketers are solving with Conversational Marketing
- Advice for building a high-impact Conversational Marketing program
- The impressive results Conversational Marketing is helping to drive
- How marketers combine Conversational Marketing with their broader marketing technology stack

Scott Holden
Chief Marketing Officer
Thoughtspot

Scott's career began at Chase, where he was a financial analyst. Soon after, Scott went to JP Morgan and then Google, before landing at Salesforce. After seven years, Scott served as the VP of Marketing for the Salesforce Platform. In 2014, Scott made a move to ThoughtSpot, where he currently serves as the CMO.

What's your perspective on account-based marketing (ABM)?
Our entire marketing team and strategy is account-based. We give a disproportionate amount of effort to the target accounts we think have the highest propensity to buy. We've organized these accounts into tiers, and each tier has a different set of programs and tactics.

Rather than decide which accounts we want to market to, we examine which accounts want us to market to them. We look for signals that indicate a company has raised their hand and is interested in our product.

How does Conversational Marketing fit into your account-based strategy?
If you've done your customer segmentation right, then not all prospects should be treated the same. We've studied our customer base and understand the characteristics of buyers that are most likely to purchase from us.

By integrating Conversational Marketing with Salesforce, we now know when those types of prospects visit our website and can have a conversation with them right in the moment. It's not a good use of resources to have a conversation with every visitor that comes to the website. But when a prospect that fits in our sweet spot comes to our website or is a "Diamond" account on our target account list, I want our best sales reps to jump in and start a conversation. That was never possible before Conversational Marketing. Further, because Qualified integrates with Pardot, sales reps are given full view of all Pardot prospect data to fuel high-quality, contextual conversations.

What measurable impact have you seen from Conversational Marketing?
We implemented Qualified's Conversational Marketing platform in less than 30 days, and since launching we've increased the number of conversations we're having with our Diamond accounts by 10X. We've closed multiple deals that we sourced through Qualified. It's really fun to roll out a marketing tool that quickly delivers impact. I love seeing won deal alerts come through that are clearly attributed to Conversational Marketing right there in the marketing source field.

What's the biggest learning you've had in your Conversational Marketing journey?
Before moving to Qualified, we used a different chat solution to engage in sales conversations with website visitors.

With that tool, there was no way to focus our conversational efforts on website visitors who displayed intent to buy. Things quickly became noisy. Our sales reps dismissed the tool and retreated to their old way of selling. That's when we learned how important it is for a Conversational Marketing tool to give you insight into each website visitor so you can prioritize your outreach accordingly.

Further, with the old tool, our conversation data was siloed from our Salesforce and Pardot platforms. This made it impossible to track conversations through to leads, opportunities, and pipeline conversion. Having all systems seamlessly integrate is a game changer.

"When a prospect that fits in our sweet spot comes to our website, I want our best sales reps to jump in and start a conversation. That was never possible before Conversational Marketing."

Mike Marcellin
Chief Marketing Officer
Juniper Networks

Mike is the Senior Vice President and Chief Marketing Officer at Juniper Networks—leading the global marketing team responsible for their product and services portfolio.

How do you view your website as part of your broader demand gen strategy?

Our website is our demand gen hub. If someone comes to our website – even if they're not in buying mode – it's an opportunity to engage with them. Whether that engagement leads to an opportunity or simply directs them to a piece of content, it's important to just get that visitor into the fold.

Our website is also a destination for customer support. Our users will come to the website for technical documentation and onboarding resources. All of these are touch points where a visitor isn't necessarily interested in being sold to, but are opportunities to engage customers to deepen that relationship. This helps us improve customer satisfaction and ultimately improve retention and upsell.

Where does Conversational Marketing fit in your website strategy?

We've been using Conversational Marketing to help answer the vast majority of the common questions our visitors have when they land on our website. These are things like, "I want to talk to a sales rep," or "I'd like to learn more about a specific product." We've set up automation for roughly 85% of these questions so we can quickly direct visitors to the resources they're seeking. We were really thoughtful about ensuring our visitors had a good impression of this automated experience by thinking deeply about all the different types of questions they would have. It ultimately removed a lot of the friction that existed before the automation.

You've seen success with chat bot tactics as part of your Conversational Marketing strategy. What about live chat?
About 85% of the time we can help our visitors using the automated chat bot, but there are instances when a visitor inquiry is better handled by engagement from a live representative on our team, whether it be an inside sales rep or a customer service rep. Conversational Marketing makes it easy for us to surface these situations and get a visitor connected with the right person.

How does Conversation Marketing help you create better alignment between marketing and sales?
We work extremely closely with our sales development reps (SDRs). These folks are typically accepting our leads and using outbound calls and emails to get in touch with the leads.

There are instances where a lead isn't yet considered a marketing-qualified lead (MQL), but there's value in an SDR engaging with the prospect to help ease them through the buying process. Conversational Marketing is a good way to create an integrated approach between marketing and sales around this engagement, so an SDR can connect with a prospect in a relevant way to help move them along the buying process.

"Conversational Marketing is a good way to create an integrated approach between marketing and sales, so an SDR can connect with a prospect in a relevant way to help move them along the buying process."

Tracy Eiler
Chief Marketing Officer
InsideView

Tracy has been driving marketing strategy at cloud-based and traditional enterprise technology companies for 25 years. Tracy has held executive roles at InsideView, Replicon, Cloud9, MarkLogic, Postini, and Business Objects. Tracy has been named to several accolade lists, including the Top 30 Most Influential Women in B2B Marketing Technology. She is a co-founder of Women in Revenue non-profit organization.

How do you think about demand generation as a CMO?

We approach demand generation in two components: small business and enterprise.

Small business is almost entirely an inbound motion, and Conversational Marketing is our primary way for handling inbound. We find most inbound leads come to us with an interest in data quality. Our approach is to help them get the information and resources they need in order to quantify the impact of their data quality as it relates to pain points they're trying to solve.

Our strategy for the enterprise segment is 100% account-based for new-logo pursuit and expansion of existing customers. We use content as the "bait" to get in front of that target audience. Then we take a similar strategy as our inbound motion by helping them quantify their problem through a data assessment "health check".

Where does Conversational Marketing fit into your demand gen strategy?

On our website, a visitor is given three options via Conversational Marketing: talk to a live person, discuss pricing, and show me a demo. These are all the front door to our sales team. With Conversational Marketing, most conversations are happening human-to-human in real time on our website. Our ability to meet a person at the moment they're engaged and have the conversations our buyers want to have is critical.

How do you approach content gating?
We're in the process of ungating a lot of our content. For so many years we hid our best content behind forms. We've found more and more visitors are filling out our forms with fake "Mickey Mouse" data, which defeats the purpose.

Many people are having conversations with us anonymously, but the sales rep is still able to determine the level of qualification in the moment. With Conversational Marketing, even if traffic is anonymous, we de-anonymize the account record and match it with the Salesforce CRM account data, then route it to the right sales person in a highly-personalized way.

How has Conversational Marketing complemented your ABM strategy?
Conversational Marketing has enabled us to activate our account-based marketing program to deliver a great customer experience for our ABM accounts.

We first selected our target accounts with the sales team, and then we mapped the target account list data from Salesforce into Qualified. This allowed us to create custom experiences for target accounts based on which ABM "tier" they were tagged in Salesforce.

Now when someone from a Tier 1 target account lands on our website, the sales rep that owns that account is instantly alerted so they can engage the lead in real time via live chat. We're able to convert leads from target accounts far faster and with more success than before.
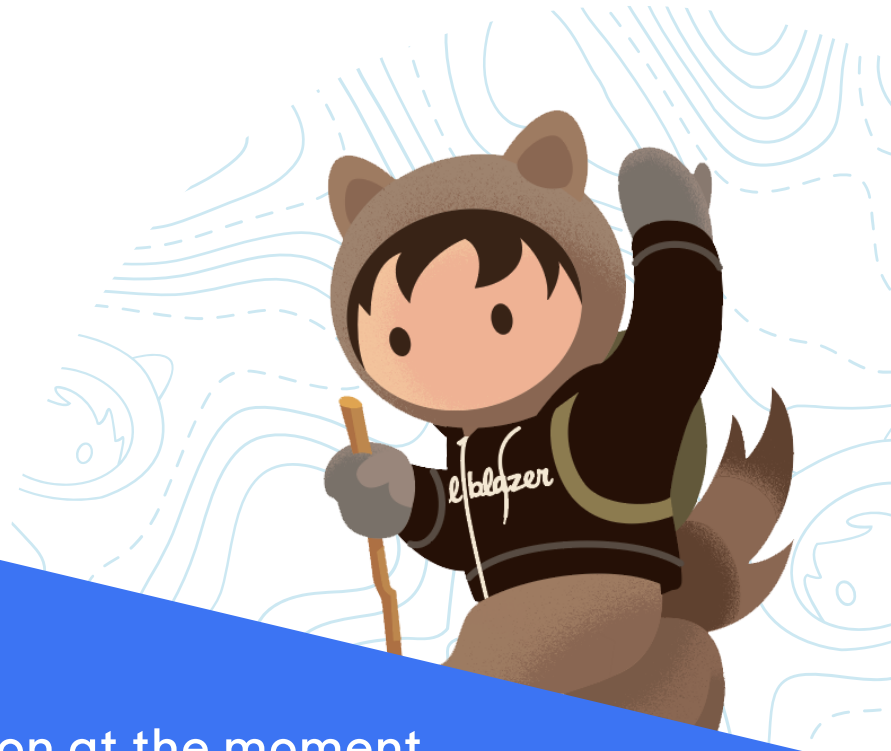
"Our ability to meet a person at the moment they're engaged and have the conversations our buyers want to have is critical."

Scott Keane
Chief Operating Officer
Bitly

Scott is an enterprise software veteran with two decades of experience. As COO at Bitly, Scott empowers Bitly's sales, marketing and operations teams with the tools they need to accelerate link management's growing adoption among businesses and teams of all sizes.

Why did Bitly choose to explore Conversational Marketing as part of their marketing strategy?
We have versions of our product offering: a top-tier plan for enterprise buyers, and a lower-tier link shortening service. As we grew and scaled the enterprise side of our sales organization, we knew we needed a faster way to cut through the noise of the lower-tier website visitors to surface buyers interested in the top-tier offering to our enterprise sales team.

How does Conversational Marketing unlock a faster pathway to your enterprise buyers?
In addition to wanting to cut through the noise to find the most qualified buyers, we also started wondering whether forms were the most effective way to capture leads and drive sales pipeline. We loved the idea that Conversational Marketing would enable us to zero in on enterprise buyers and instantly engage them in a sales conversation.

The window of time when you have a buyer's attention is so small, and we wanted to give our enterprise sales team the best chance at capitalizing on that opportunity.

What are some of the most successful Conversational Marketing tactics you have in play?
We serve Conversational Marketing experiences on our high-value, high-converting website pages in an effort to fast-track sales conversations with serious buyers. This includes pages such as our features pages, solutions pages, and "Why Bitly" pages, which are known to be visited by buyers interested in our enterprise offering.

Our "Get a Quote" page is our primary call to action across the website and our standard lead capture mechanism. With Conversational

Marketing, buyers can get an instant, personalized conversation with a sales rep for guidance on our pricing and packaging options as opposed to filling out a form and waiting for us to get in touch.

How are you utilizing Conversational Marketing with Salesforce and your marketing automation platform?
With Qualifed, tapping into our Salesforce data is super straightforward. The integration allows our sales team to get a clear picture of each website visitor, including any relevant Lead, Contact, Account, or Opportunity data. Once a conversation has happened, the rep can easily create or update Lead or Contact records without having to do any manual entry.

By connecting Qualified to our marketing automation platform, the sales rep is able to get insight into the visitor's historical engagement with Bitly across marketing channels. These integrations set us up to engage buyers with richer context and progress them through the sales cycle intelligently.

How do you measure the success of your Conversational Marketing investments?
We've seen quite the business impact from Conversational Marketing. We're having hundreds more sales conversations per month, increased our marketing-qualified leads by 2x, and we're driving 6x the pipeline from pages where we use Conversational Marketing experiences. We refer to Conversational Marketing as the cash register for our enterprise B2B website.

"We refer to Conversational Marketing as the cash register for our enterprise B2B website."

Nate Skinner
Former CMO
Salesforce Pardot

For over 20 years, Nate has been building, executing, and leading marketing and sales programs for B2B technology companies including Salesforce, Amazon Web Services, Campaign Monitor, Embarcadero Technologies, and Borland Software.

How do you think about pipeline and your go-to-market strategy?
If you're not thinking about pipeline every day, then you're not doing your job. But pipeline is the metric. If we're thinking about the customer's experience and the problems they're trying to solve, we're going to find them because we're speaking in their language. Ultimately, it's about engaging prospective customers in their language and talking about the things they care about. And if you're doing that well, then the pipeline is a trailing indicator of your success.

What are the biggest challenges B2B marketers face today?
It's noisy out there. How do you stand out? How do you put a message in front of your audience that's appropriate, at the right time, in the right place, where they spend their time and get their information? That's the challenge, and what brings out the creative side of marketing. It's being concise, specific, and reaching the right audience, in the right channel, at the right time.

What is Conversational Marketing to you?
It's the last mile of the lead generation motion. We put ads in the market, we put emails out, we run campaigns, and we attract people to our website. And then what happens? For many companies, they struggle with this "and then what?" part.

Conversational Marketing is closing that last mile. It's surfacing when someone came through a campaign, is on your website looking around at your pricing page, and enables you to talk to them in real time.

Companies can only have real-time sales conversations with so many people. What do you do with everyone else?
The solution is chatbots. Chatbots are good for anonymous visitors and a high volume of visitors.

But what you really want to do is identify the extraordinarily-qualified visitor and connect those people immediately to a salesperson. And that's what Conversational Marketing does. Conversational Marketing enables companies to convert leads at a totally different rate than they were able to before.

How do you think about Conversational Marketing and ABM?
If 100 accounts are 80% of your business, don't you want to treat them differently when they land on your website? The first step is to align with your sales team. The next step is to pick a couple of accounts to test it out on.

The majority of marketers are combining ABM with general broad-based marketing programs. You don't need to completely swap out what you're already doing. Test out Conversational Marketing with some select ABM accounts and see what happens.

What advice do you have for aspiring marketing leaders?
Never stop trying and testing. Take some percentage of your budget and your time to try new things. But don't be a servant to the metrics along the way. Getting beholden to a number paralyzes people. New things like Conversational Marketing and ABM help you set you company in a different trajectory and break through that noise.

"Conversational Marketing enables companies to convert leads at a totally different rate than they were able to before."

Craig Shull
SVP of GTM Operations
GetFeedback by
SurveyMonkey

Craig joined the SurveyMonkey team through the 2019 acquisition of GetFeedback, where he served as CEO. He previously served as the Chief Operating Officer of Campaign Monitor and the senior vice president for pricing and operations at Salesforce. Craig holds a bachelor's degree in mechanical engineering from Massachusetts Institute of Technology and master's degree in business and supply chain management from Stanford Graduate School of Business.

What go-to-market barriers do you see marketers commonly face when it comes to engaging their target buyers?

Our ability to engage with buyers is largely dependent on earning the right to communicate with them. As consumer privacy laws become increasingly rigorous, traditional channels like email marketing are becoming less effective at reaching our target buyers.

For years, we've relied on mechanisms like lead capture forms and gated content to get access to our buyers. But buyers are now choosing to shop anonymously or are providing false information to unlock content they desire. It's a major shift in the B2B buying dynamic, and a dilemma all marketers are being forced to address.

How have you sought to solve this challenge for GetFeedback?

Luckily the targeting capabilities for online advertising are becoming much more robust. We use paid advertising and Salesforce AppExchange marketing to reach audiences we know are a good fit for our products. But we needed a more effective way to capture this traffic once it hits our website.

That's why we investigated Conversational Marketing. We couldn't wait for our buyers to share their email address with us before we engaged them in personalized conversations. Conversational Marketing helps us capitalize on website visitors by reaching them with the right message at the exact moment we have their attention using chatbots and live chat.

Could you share what your Conversational Marketing program looks like in action?

We have a handful of different Conversational Marketing experiences deployed according to the visitor and their stage in the buying cycle.

For anonymous visitors, we've set up experiences on our high-conversion pages—such as our pricing page—to offer a way for these visitors to chat with us to quickly get the information they're seeking.

For known visitors, we use a couple Conversational Marketing tactics to really personalize their experience. With Qualified's Salesforce integration, we can see if a visitor has an open Opportunity or is an existing customer. If there's an open Opportunity, we fast-track those buyers to their account team to engage in a live chat. If the visitor is an existing customer with a green health score, we use Conversational Marketing experiences to share helpful product information with the goal of driving cross-sell traction.

Where are you looking to evolve your Conversational Marketing strategy in the future?

We're really active on the Salesforce AppExchange. We're excited to expand our Conversational Marketing efforts from our website over to the AppExchange with Qualified's new AppExchange chat offering. Today, AppExchange traffic needs to navigate to our website to engage with us in a live chat. But with this development, we can have 1-1 conversations with buyers right on our AppExchange listing. This will allow us to immediately service those potential buyers and get access to high-intent leads without the need to send them to our website. I think it'll be a game changer for how we interact with that community.
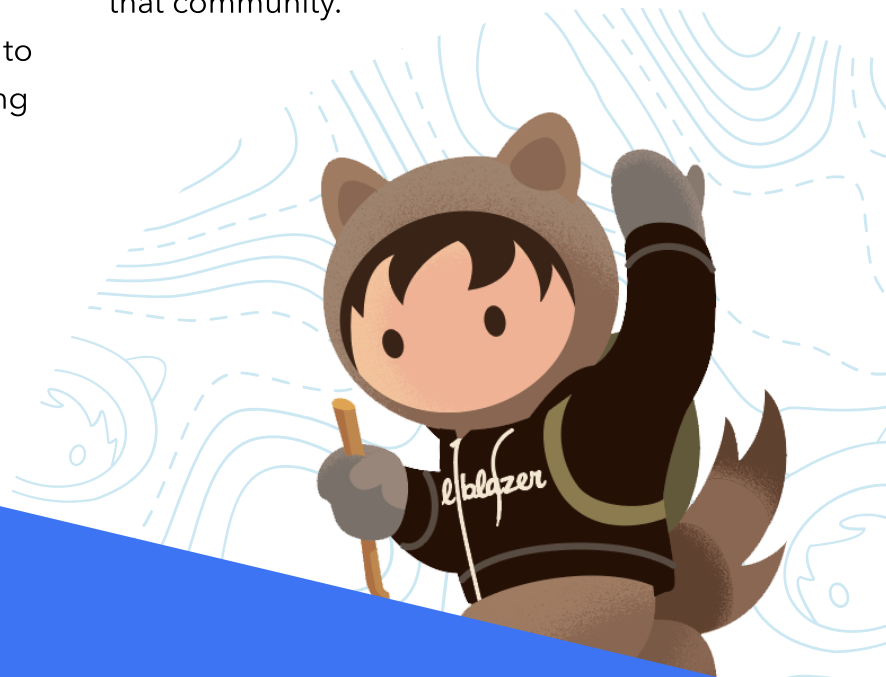
"Conversational Marketing helps us capitalize on website visitors by reaching them with the right message at the exact moment we have their attention"

Sara Varni
Chief Marketing Officer
Twilio

Sara is responsible for growing Twilio's community of developers while also bringing Twilio into the enterprise market. Prior to Twilio, Sara was SVP of Marketing at Salesforce where she was responsible for the positioning and go-to-market strategy for Sales Cloud, the world's leading sales platform.

Where does your website fit in your demand generation strategy?

When it comes to our website, we always need to be focused on generating as many leads as possible. But it's bigger than that. We want to be sure we're surfacing the right content for our personas and buyers. That means delivering the right customer stories and the right level of personalization.

That's where Conversational Marketing comes into play. If you're in the business of selling technology to other businesses, you need to deliver the most personalized, customized engagement experience possible. With software like Qualified, you can know where a visitor came from, have an engaging conversation, and get them what they need as quickly as possible. That's the modern experience that visitors expect from a website.

Twilio is rooted in a massive developer ecosystem, but the direction is to penetrate larger enterprises. How do you think about account-based marketing (ABM) to fuel this effort?

When I first started at Twilio, I thought about two funnels: our developer funnel and our line of business funnel. What I've since learned is we have one big funnel and the developer funnel feeds the line of business funnel. As marketers, ABM helps you connect the dots within your most important accounts and create revenue opportunities for your sales team.

When it comes to ABM at Twilio, it takes form in a couple different ways:

One part is identifying developer activity within an account and flagging that behavior for our sales team. If we see signups within an account, that's a signal that a project is underway.

It can also take form in high-touch programs for our top accounts. We've been doing enterprise hackathons where we host American-Idol style hackathons for big customers like U-Haul. People break up into teams based on the challenges they're trying to solve and at the end of the day they pitch what they've built. It's a win-win. The company's developers get free training from our Twilio evangelists, and on the flip side, we're able to accelerate a proof of concept process that could have taken over a year.

What's top of mind for you as a CMO of a multi-billion dollar, publicly-traded company that continues to grow at a breakneck pace?

In today's world, we need to make sure we're aligned as an organization on which use cases are the most relevant for our customers right now. Things like contactless delivery, remote contact centers, or telehealth have come into focus as we navigate the new normal.

Outside of that, I'm constantly looking ahead to set the foundation for the next year, the next 3 years, and the next 5 years. I'm asking myself and our team:

Are we placing the right bets internationally?

How are we thinking about our website?

How are we scaling for the largest enterprises

"With software like Qualified, you can know where a visitor came from, have an engaging conversation, and get them what they need as quickly as possible. That's the modern experience that visitors expect from a website."

Jesse West
Director of Lifecycle Marketing
ringDNA

Jesse is a storyteller and obsessive optimizer with more than 10 years of experience helping brands communicate effectively with customers across all media. As Director of Lifecycle Marketing at ringDNA, Jesse is responsible for enhancing the customer journey from awareness to advocacy.

Where does Conversational Marketing fit into your demand gen strategy?
The worst thing we can do as marketers is stand in a buyer's way when they want to have a conversation. We spend valuable resources to get interested buyers to our site, and the last thing we want to do is add friction once they're ready to talk. B2B buyers are fantastic at self-education, but when they're ready to talk to sales, reps have a short window of opportunity before they go to the competition. Conversational Marketing empowers ringDNA to provide buyers with an easy way to instantly connect with a rep on virtually every page on our site.

Why did you ultimately decide to invest in Conversational Marketing?
We initially chose Qualified as a Conversational Marketing vendor because of their amazing integration with Salesforce. ringDNA and Qualified both are Salesforce-only solutions, so I knew that the integration wouldn't be something that was bolted-on as an afterthought. We also chose to invest

in Qualified because of the ability to proactively engage with prospects, a feature that has helped us drive a lot of revenue.

Do you have an account-based strategy?
Like many B2B companies, ringDNA has pivoted to a full "account-based everything" strategy. Tools like 6Sense are giving us powerful insight into buyer intent from leads at our target accounts. Our reps also use Guided Selling by ringDNA to automatically know which accounts to prioritize on a given day, who to reach out to within an account, how to reach out, and what to say.

How does Conversational Marketing fit into your "account-based everything" strategy?
With Qualified, we can instantly alert reps when contacts from target accounts interact with the chatbot. We can serve up different messaging to contacts at target accounts based on where they are in their journey.

We can also empower reps to proactively initiate contact with contacts at target accounts with messaging that's tailored to their onsite activity.

How do you see Conversational Marketing changing the B2B buying experience in the future?
We're already seeing B2B companies experiment with ungating at least some of their premium content. Conversational Marketing is making this possible by still providing a vehicle for lead collection on pages with ungated content. Conversational Marketing is a game-changer because it allows B2B companies to say, "if you want to access content or speak to sales, you can do it right away without having to fill out a form."

What impact are you seeing from your Conversational Marketing efforts?
In 2020, our Conversational Marketing efforts have been associated with some of our biggest deals. But what's really interesting is

that we've also seen existing customers engage with our chatbot and have seen upsell activity as a result.

How do you use Conversational Marketing in conjunction with your CRM, marketing automation platform, and even your own product?
Since Qualified integrates with Salesforce, our marketing automation platform, and multiple ABM tools, we can really tailor chatbot experiences according to where our customers are in their buying journey. We can also provide our sales reps with a wealth of information about prospects within the context of chat. Our reps use our own product for sales engagement, and we are using intent data gathered from Qualified to prioritize leads and accounts within follow-up cadences.

"Conversational Marketing empowers ringDNA to provide buyers with an easy way to instantly connect with a rep on virtually every page on our site."

Jamie Grenney
Chief Marketing Officer
OwnBackup

Jamie spent 11 years at Salesforce learning from the best. His specialties include product marketing, enterprise software, category creation, operations, and the full range of sales and marketing playbooks. After Salesforce, he spent 5 years working at startups backed by Redpoint, A16Z and Sequoia. Jamie is skilled at building marketing teams, working with sales and product, and scaling high–growth businesses. Prior to OwnBackup he led a large product marketing and enablement team at Okta.

How would you describe your demand gen strategy?

I think about demand gen as four key engines: inbound pipeline, outbound SDR-sourced pipeline, AE-sourced pipeline, and partners. When you build a demand gen strategy, you must think about how you're building, scaling, and measuring each of those areas. We have demand gen teams that fit into each of those areas to ensure we're driving sufficient coverage across all engines.

What's an area of demand gen that you think is most primed for transformation?

Every company has a pipeline gap to fill, but cold outreach just no longer makes sense. It's expensive, inefficient, stressful, and often yields disappointing results. These days, if you're a high-value prospect, you're bombarded with unsolicited calls, emails, and advertisements that you're going to tune out. It's marketing's next frontier to define how we are going to address this.

What are some ways you're cutting through the noise to reach your prospects?

We executed a big research project to define our personas by aggregating sales learning and distilling those down into three high-value targets: Salesforce platform owners, C-level executives (CIO, CTO, and CEO), and compliance/risk owners. Each persona has a unique pain point that we build a messaging foundation around. OwnBackup has also established a vertical strategy, as several verticals that are important to their business are highly regulated and it's important to speak their language. We craft messaging around these personas and verticals to

ensure how we're engaging with buyers is hyper-relevant to their unique role, industry, and pain points.

How is Conversational Marketing related to this movement?
The future of how we engage with prospects and customers is less about forms and more about improving the quality of conversation we have with buyers and ensuring that happens at the right time. The idea that someone fills out a form and a sales rep spends the next two weeks following up with them is so off. We know there's a high competition for B2B buyers' attention. We need to make the most of the opportunities we have when they're interested and invested in learning about our offerings.

Where are you excited to see Conversational Marketing evolve?
We use Qualified as our Conversational Marketing platform, and I'm really excited to see them begin to support chat and conversational marketing functionality within the Salesforce AppExchange. OwnBackup has a big focus on the Salesforce community, so the AppExchange is a major demand gen engine for us. Being able to utilize the same real-time engagement Qualifed unlocks on our website within the AppExchange is very exciting.
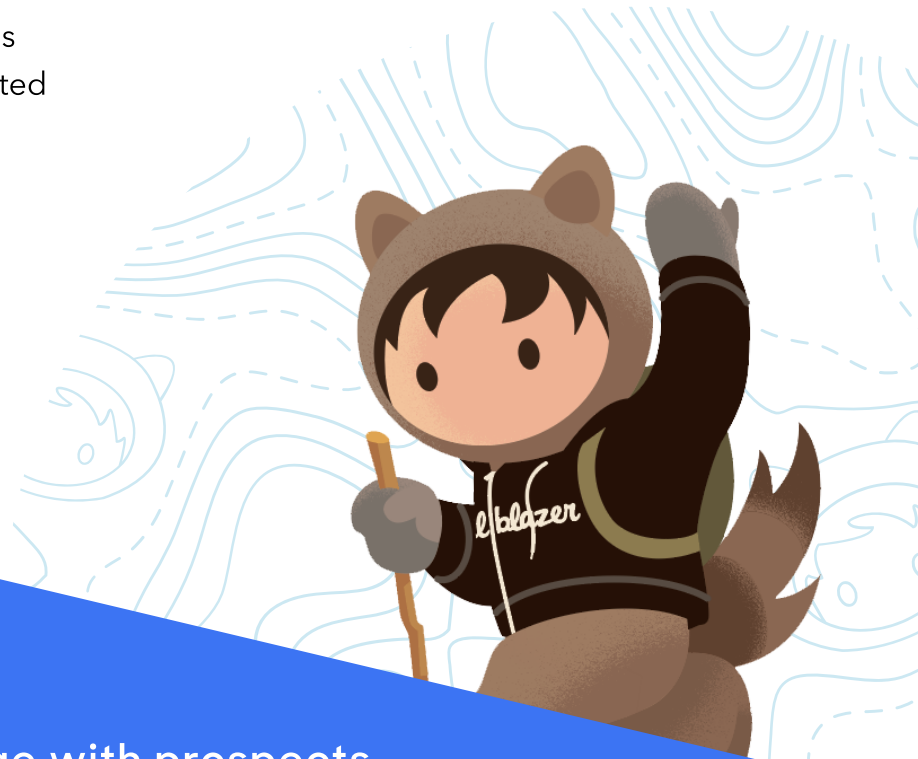
"**The future of how we engage with prospects and customers is less about forms and more about improving the quality of conversation we have with buyers and ensuring that happens at the right time.**"

Jennifer Schneider
Head of Solutions Architecture
Cheshire Impact

Jennifer is an industry expert and thought-leader in the Salesforce/Pardot and Marketing Automation technology sphere. Jennifer is a vibrant member of the Salesforce Ohana and currently heads up Cheshire Impact's Solutions Architecture practice.

Why do you think Conversational Marketing is such a growing trend?

Marketers don't want to have to chase leads. By the time a sales person gets in touch with a new lead, they've already gone to their competitor's site. The ability to connect with people instantly through a Conversational Marketing tool is a huge win.

Conversational Marketing also allows your sales team to get more involved with what marketing is doing. Your best content ideas come from your sales team, those who are on the street talking to clients every day. On the flip side, for marketers, Conversational Marketing allows us to show that we're bringing value to the sales organization. The fact that your marketing and sales team can work together to develop a criteria for who is qualified and then talk to them instantly…that is absolutely mind shattering.

Why is it so important to integrate your Conversational Marketing tool with marketing automation tools, such as Pardot?

Conversational Marketing fills in a gap in marketing automation, which is "How do I talk to my qualified website visitors, right now?". It allows someone who is using Pardot to have access to this advanced B2C-like functionality.

There are many digital marketers out there that are so frustrated. They love Pardot but they need more information around how their digital properties are performing, and how they can better convert. Qualified fills a huge gap that we're seeing today. It's a no-brainer. I also love that you can do Conversational Marketing on Pardot landing pages. Crazy awesome! You can talk with visitors throughout every Pardot asset, like a webinar or event landing page.

Not only do you recommend Conversational Marketing to your client, but you've been using Conversational Marketing on the Cheshire Impact website. How is that going?

When it comes to Conversational Marketing, we tell clients to first start small and understand how people are browsing your site. Then, take your top performing campaigns and use them as launching pads for sales conversations.

We eat our own dog food here at Cheshire. When we first started, we made sure to set up a Conversational Marketing dashboard so we could closely monitor how we engage with prospects across our best-performing campaigns and landing pages. It's been incredible!

What's one surprising Conversational Marketing learning you've had along the way?

As marketers, we're often behind the scenes. We create beautiful content, produce events, launch new products, but we don't get to be a part of customer interactions as much as our sales team does.

With Conversational Marketing, marketers will learn new things by watching how visitors are engaging with your sales team on your website. We're no longer limited to measuring engagement with opens and clicks. With Conversational Marketing, we actually get to see how people are digesting our content and interacting with our sales team. From a strategic point of view, Conversational

"The fact that your marketing and sales team can work together to develop a criteria for who is qualified and then talk to them instantly…that is absolutely mind shattering."

Lauren Newman
Digital Marketing
Synack

Lauren started her career in the entertainment industry, but was introduced to B2B marketing while working at a full-service marketing agency. She loved the challenge of B2B marketing, and today Lauren runs the digital marketing strategy at Synack, a cyber security company.

Where does your website fit into your overall demand gen strategy?
As a B2B company, our buyers' journey is multi-touch. Rarely will a prospect hit our website once and immediately want to buy. Research, education, and nurturing are required before a prospect will welcome a conversation with a sales representative. We develop website content tailored to specific audiences to address the prospect wherever they are in the buyer journey. We then drive prospects to that content via email, digital ads, social media, etc. with the intent that they will take it, consume it, and even disseminate it amongst their own team.

Where does Conversational Marketing fit into this strategy?
The ultimate goal is to get a prospect to want to contact us for more information. However, there's only so much influence we can have over form fills, calls to action, and buttons. With Conversational Marketing, we're able to customize what visitors are prompted with on

different pages. We invite them to chat if they're ready, otherwise we guide them to the information most relevant to them.

Why do you think so many companies are adopting Conversational Marketing?
Every day, there are millions of things trying to grab the attention of B2B buyers. Once a prospect is in the mindset that they want to buy and go to a vendor's website, you can bet that prospect won't be in the buying mindset for long. Something else will capture their attention. The ability to have a conversation with a prospect at the exact moment they're interested in your product is invaluable.

How has Conversational Marketing advanced the way you engage buyers?
With Conversational Marketing, we can work with our sales team to proactively approach

prospects who are on our website and interested in our offerings. Rather than just waiting around hoping a prospect fills out a contact request form, our sales team can immediately chat with the buyer and help address their pain points.

How do you combine Conversational Marketing with your existing martech stack?
Our Conversational Marketing platform, Qualified, syncs seamlessly with Salesforce and our marketing automation tools and helps us in a couple of powerful ways:

First, it allows us to improve tracking and data. If someone comes to our website and interacts with the chat bot in any way, this information is automatically sent to Salesforce and our marketing automation platform. We don't have to do any manual lead creation. Plus, it removes any complexities around attribution.

Second, the integrations help us build customized experiences for our website visitors. Qualified reads Salesforce and our marketing automation platform to determine whether a visitor is a Lead, Contact, existing customer, or unknown, and then tailor the experience using those insights.

What learnings would you share for someone getting started with Conversational Marketing?
It's really important to take your marketing hat off and think about the customer's experience. Rather than focus on how to achieve your own objectives—driving leads, creating meetings, etc.—think first in terms of how Conversational Marketing can help make your user experience on the website the best it could possibly be. If you do that, your objectives will ultimately be met, too.

"With Conversational Marketing, we can work with our sales team to proactively approach prospects who are on our website and interested in our offerings."

Tigh Loughhead
Founder
RentBoost

Tigh is an author and speaker with nearly a decade's experience in real estate tech. Tigh has deep roots in the Salesforce Community: he's a 4X Salesforce certified admin, a 2X Salesforce MVP, a regular Dreamforce speaker, and co-leader of the New York Trailblazer Community Group for Pardot B2B Marketing.

What trends are you seeing in the B2B marketing world right now?

What's really hot right now is personalization, contextualization, and delivering really hyper-targeted, relevant information to consumers. Modern day consumers expect to have their specific needs addressed. Intent-based marketing is really huge right now. Capturing people when they demonstrate intent in some specific direction and using that as a segmentation mechanism is super powerful.

How does Conversational Marketing fit into that growing trend?

I've been involved in a developer meetup here in New York City that's really focused on Conversational Marketing and chatbots. Whether it's Slack, Facebook, SMS, or meeting on your website itself, it's a cutting edge way to engage with your buyers.

Conversational Marketing is a big shift from traditional, mass marketing, which is an old way of doing things. It really provides the opportunity for individual customers to get what they need—information, education, demos, or even purchases—all online, immediately, without having to go through all those traditional phases that we marketers like to use.

Why do you think the traditional way of capturing marketing leads – sending buyers to forms on your website – is losing popularity?

Consumers have wildly different habits and different traits. I think that one conversion path is never going to satisfy different consumers. The traditional funnel of branding, to education, to actually getting someone to make a decision. That doesn't work for everyone.

Offering different avenues to receive information and to get in touch with a sales team as quickly as possible, that is the opposite of the traditional way of marketing. And that's exciting.

You're a Pardot super-user. Why is it so important to integrate your Conversational Marketing platform with your marketing automation platform?

This gets me really excited. There's so much business intelligence about prospective customers in Pardot: who they are, their search criteria, their buying criteria, what pieces of your brand they're actually engaging with. The ability to customize a personal experience for individual buyers and give them the ability to have a live conversation…that's the utopian vision of a perfect marketing and sales strategy.

"The ability to customize a personal experience for individual buyers and give them the ability to have a live conversation…that's the utopian vision of a perfect marketing and sales strategy."

Andrea Tarrell
CEO & Founder
Sercante

Andrea is a 12X certified Salesforce MVP and the founder of consulting company, Sercante. Andrea is a total Pardot pro, but when she's not Pardot-ing, she can be found playing with her German Shepherd Murphy, making homemade gin, or traveling with her hubby Buck.

How did you get into the B2B Marketing space and become such a Pardot expert?
Like many people in this ecosystem, I totally stumbled into it. The company I was with at the time got onto Salesforce when a random salesperson bought it, haphazardly over-customized it, and then rolled out admin access to everyone. It was a mess!

The VP of Sales came to me with a hand drawn picture of what he wanted Salesforce to look like—it was a lot like Sales Path in Lightning, actually—and told me if I could learn how to build it at Dreamforce, that the company would pay for me to go. I had no idea what a tall order I was committing to when I said yes, but I went, and the rest is history! Dreamforce is where I originally heard about Pardot and I've been an admin and a logged in, hands-on-a-keyboard user pretty much every day since.

What B2B marketing trends are you seeing right now?
We're seeing a trend towards heavy personalization. Consumers are used to Netflix, Pinterest, Amazon style customization. Like it or not, they have those same expectations when they're operating in a business capacity. They're looking for tailored experiences that cater to exactly what they're looking to do next.

That's a huge opportunity for B2B marketers, but you have to have the data of where that person is on their journey so that you can get up to speed quickly and take action based on where they are in the funnel. Another huge part is having systems that are tightly integrated so that you can act on all that data that you're gathering in separate systems.

What's your perspective on Conversational Marketing?
Conversational Marketing is providing a personalized experience to people who are interacting with your website and using data to get the right information to the right people at the right time.

In B2B, buyers are more self-sufficient than they've ever been before. They're doing a lot of research online. Nobody likes to talk to sales until they're ready to talk to sales. There's a huge opportunity with Conversational Marketing to help with the qualification process, and then once somebody does have the information that they need, put them in touch right away with a salesperson that can help with that last-mile push.

How does Conversational Marketing complement Pardot?
There's so much that you can do with the two tools together. Conversational Marketing is a great way to engage a prospect when they're on your website, and Pardot continues that conversation after a person leaves your site to keep them warm and give them reasons to come back. Once you get the two of them working together, it becomes a virtuous cycle that drives better a lead nurturing and conversion program.

What advice would you give to someone who's looking to get started with Qualified for Pardot?
Start by talking to your sales team about lead quality: what the handoff looks like today, getting feedback on what's working well in the process, running some analytics on what leads are most likely to close. Then use that as a jumping-off point to think of ways to take your conversion rates to the next level. Look at Conversational Marketing as a way to identify sales-ready visitors and drive more leads to the next stage in the buying process.

> "Look at Conversational Marketing as a way to identify sales-ready visitors and drive more leads to the next stage in the buying process."

Adam Figueroa & Emily Frazier

Brandfolder

The team that powers Brandfolder's Conversational Marketing strategy includes Adam Figueroa (Director of Demand Generation Manager) and Emily Frazier (Implementation Specialist). Together, they're leading the charge to revamp how Brandfolder engages with website visitors to drive impressive results.

Why did Brandfolder decide to invest in Conversational Marketing?

Conversational Marketing is a new way of approaching your inbound opportunities. We viewed Conversational Marketing as a way to revamp our website by making it more interactive and conversational. As a modern marketer, you have to address the fact that people want to talk to you the way that they want to talk to you. It could be a form. It could be a phone call. It could be an email exchange. The way that we approach demand generation at Brandfolder is that you have to have an avenue to reach people the way that they want to be reached, so we try and hit as many channels as possible.

How does Conversational Marketing enable you to deliver your ideal website experience?

We wanted to build a Conversational Marketing strategy to enable people to enjoy a self-service experience based on our website offerings.

We broke it out into paths such as, "Do you want to contact sales?", or "Do you want to learn more about Brandfolder?". We thought about the various objectives a person might have and the corresponding content they would want to get from our website, and then built the chat experience to help guide them rather than leave them guessing.

What measurable impact have you seen from Conversational Marketing?
We implemented Qualified's Conversational Marketing platform in less than 30 days, and since launching we've increased the number of conversations we're having with our Diamond accounts by 10X. We've closed multiple deals that we sourced through Qualified. It's really fun to roll out a marketing tool that quickly delivers impact. I love seeing won deal alerts come through that are clearly attributed to Conversational Marketing right there in the marketing source field.

What's the biggest learning you've had in your Conversational Marketing journey?
Before moving to Qualified, we used a different chat solution to engage in sales conversations with website visitors.

With that tool, there was no way to focus our conversational efforts on website visitors who displayed intent to buy. Things quickly became noisy. Our sales reps dismissed the tool and retreated to their old way of selling. That's when we learned how important it is for a Conversational Marketing tool to give you insight into each website visitor so you can prioritize your outreach accordingly.

Further, with the old tool, our conversation data was siloed from our Salesforce and Pardot platforms. This made it impossible to track conversations through to leads, opportunities, and pipeline conversion. Having all systems seamlessly integrate is a game changer.

"We've generated 4x more leads and 6x more sales opportunities, thanks to our Conversational Marketing efforts."

Joe Leverson
Head of Digital Marketing
Gamma

Joe Leverson is the Head of Digital Marketing at Gamma Communications, an award–winning technology–based provider of Unified Communications services to the UK business market, nonprofits and the public sector. Leverson, a digital specialist with expertise in branding and lead generation, serves as team leader of digital and creative at Gamma.

As a marketer, why are you excited about Conversational Marketing?

It's hard to get the right people onto the right website pages and capture them in an effective way. That's why we started initially looking at basic-level chatbots to help drive quality engagement.

I had some early success, but visitors were still going into the lead queue and it was still taking days to have a conversation. That's when I turned to Conversational Marketing. Being able to instantly connect visitors with the right person is awesome. Whether it's just qualifying someone faster or getting the right people in front of the right salespeople, that's the vision we bought into.

When you first launched Conversational Marketing on your website, you started with a bots-only approach and then expanded into live chat. How did that go for you?

Before we put chatbots on our site, we were driving people to standard forms that had low completion rates. We started off with one bot to serve the entire website, engage visitors, and capture leads. The bot approach tripled conversion rates just by inviting website visitors to engage in a more authentic way.

The success we were having with the bot-centric approach was enough to convince me that it was time to expand our Conversational Marketing strategy into live chat as well. It was already a universal success, so I knew we were going to drive even greater impact if we put a couple of live reps on the platform.

What does it look like to leverage Conversational Marketing with your other sales and marketing tools?

Our Conversational Marketing tool, Qualified, seamlessly connects to our Pardot, Salesforce, and Clearbit tools. This allows us to see details about a website visitor right there within Qualified, such as job title, company name, location, SIC code, and employee count. It's amazing. Instead of spending the first five minutes of a conversation trying to qualify or understand the best product fit, it gives that information straight away. It's a great feature of the platform.

How has Conversational Marketing helped your business since go-live?

We didn't have to spend months trying to code and deploy something. We launched the platform, and it sits in the same Salesforce ecosystem that we operate in already. We've generated 150 sales opportunities and nearly £2 million in pipeline in less than 6 months, all through the Qualified platform. It's fantastic.

How has Conversational Marketing helped your business since go-live?

Conversational Marketing success is a mixture of getting the right website traffic to our site and our sales reps having the soft skills to be able to engage with people, understand where they have been on the website, what they're looking at, and where they are in their buying journey.

You have to be authentic. You're a person having a conversation with another person. You can't be overly formal, like you may be when you're introducing yourself over email, for example.
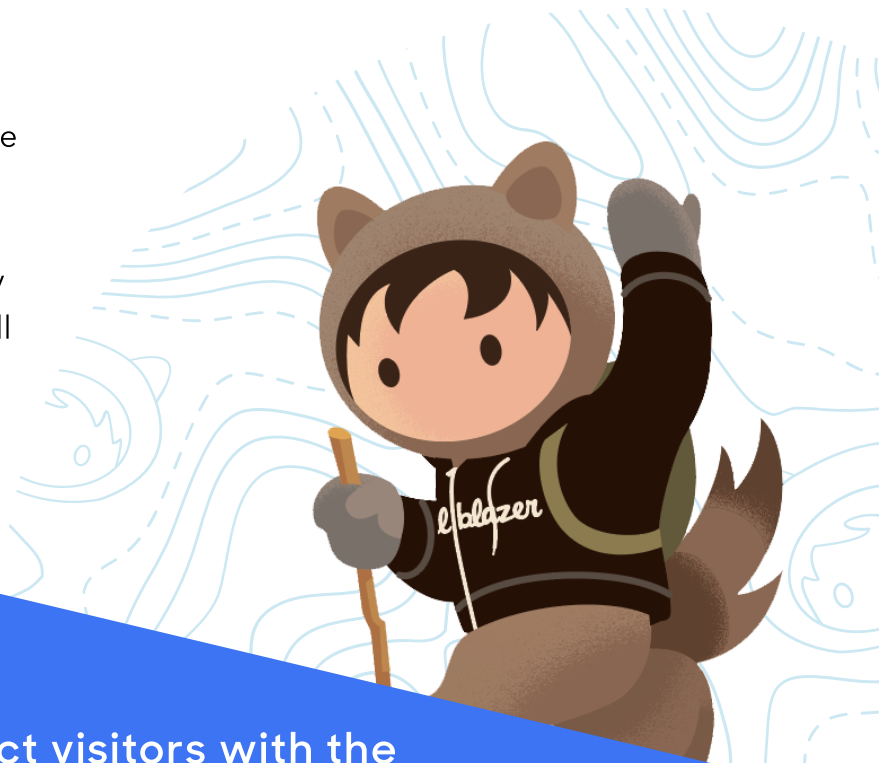
"Being able to instantly connect visitors with the right person is awesome. Whether it's just qualifying someone faster or getting the right people in front of the right salespeople, that's the vision I bought into."

Keegan Thomson & Calvin Goodman
atSpoke

Keegan Thomson (Marketing) and Calvin Goodman (Sales Engineer) pioneered atSpoke's first-ever Conversational Marketing strategy. The atSpoke team prides themselves on adopting modern technology that allows them to move quickly and deliver stellar customer experiences.

What business challenges were you trying to solve by implementing a Conversational Marketing solution?
One of the big problems we were having was form dropouts and losing people along the marketing funnel of our website. Conversational Marketing allows us to create a conversation with a prospect earlier than normal and catch a lead before they bounce from our website. We no longer have to chase leads via email. Conversational Marketing gave us another route to engage with visitors in an instant.

What was important to you when choosing a Conversational Marketing platform?
We were using a different chatbot tool at first, but the sales team found it difficult to use. It was not well integrated with Salesforce, so we could only access limited data on our visitors. We knew we wanted a tool that gave us easy-to-use, advanced customization options and integrated well with Salesforce. Additionally, the ability to create different experiences on different pages was important to us. We wanted to be able to switch between chatbot and live chat experiences in various places across our website.

How do you approach using chatbots versus live chat experiences?
We use chatbots to quickly surface relevant content, qualify visitors, and offer prospects the opportunity to book demos with our sales team. If we know that a specific visitor belongs to a company of a certain size or is exploring an important page (Qualified

surfaces these insights for us), then we fast track those individuals to live sales conversations. For example, someone on our pricing page would instantly connect with a live sales rep to get a custom quote, while someone browsing the blog would see the chatbot surface recommended content for further reading.

How are you using Conversational Marketing and Salesforce together?
We're using Qualified's easy Salesforce integration so our sales team can pull in all relevant data on existing contacts and leads into the Qualified application. This gives them a clear picture of who they're talking to during a conversation. Plus, every lead created, meeting booked, and conversation started automatically syncs to Salesforce, which makes it easy to track Conversational Marketing data within our larger sales and marketing reporting structure.

What were some of your early observations on the effectiveness of Conversational Marketing?
Right after we implemented Conversational Marketing experiences on our website, we got 18 leads in the first week. These were people who came to our website to book a demo when nobody was available to chat with them live. In the past, those people would simply leave our website. We would try to reach out to them, but it's almost a lost cause at that point. Now, our qualified buyers can book a meeting with the click of a button. We've seen a huge impact on sales.

"Our qualified buyers can book a meeting with the click of a button. We've seen a huge impact on sales."

Liam Taylor
Digital Marketer
IMD Business School

Liam is a digital transformation expert, with experience in every area of disruption related to sales and marketing. At IMD Business School, Liam deploys world-leading technologies to drive innovative and new ways of engaging customers for attraction, conversion and retention. IMD Business School was recognized by Financial Times as one of the top three executive education programs in the world.

Why drove you to explore Conversational Marketing?

At IMD, we had been feeling the pain of the traditional form experience for a while. We were driving interested students to our "Contact Us" and "Download Brochure" forms, and upon form completion, our sales team began their follow up process to schedule a meeting. This was tedious for the sales team; they called it a "tennis match" of back and forth emails and phone calls. Plus, it was frustrating for our prospective students, who expected instant, easy experiences.

Our sales reps were only connecting with 2% of our website traffic, and they were only converting 5% of our leads into registered students. We knew there had to be a way to create a more instantaneous sales experience and get these students in the door at a higher success rate.

How does Conversational Marketing fit into your broader martech stack?

Integration with our major martech tools—Salesforce and Pardot—is extremely important to us. Connecting our Conversational Marketing tool to the rest of our tech stack helps us intelligently engage with website visitors, and adds real horsepower to our strategy. We can now instantly recognize when Leads and Contacts are on the site, route conversations to proper Account Owners, and surface relevant Opportunity and Account data. The possibilities with these three systems tied together with our website are seemingly endless.

What are some of the best-performing Conversational Marketing experiences you've built?

We saw great success in building tailored experiences for returning Leads and Contacts. We made sure we let them know we recognized them, and that we rolled out the red carpet for them. We quickly saw these known visitors had much higher engagement: 2x more likely to engage with our chat messenger, 3x more likely to book a meeting with sales, and progressed to an Opportunity 38% faster.

We also use chatbots (versus live chat) so we can engage visitors around the clock, even when our sales team isn't online. This means we don't miss a chance for visitors to book meetings with program advisors at their convenience. 70% of these chatbot-scheduled meetings result in qualified lead conversations, and are conversations we may have missed out on before.

How are you using Conversational Marketing helped you navigate COVID-19?

Our Conversational Marketing program had strong momentum, and then COVID-19 hit. As an institution, a big part of IMD's business revolves around on-campus interactions. Suddenly we needed to shift our entire strategy to digital and double-down on how we use our website to engage with prospective and current students.

We were lucky our Conversational Marketing platform was geared up and ready to go. Despite a reduction in advertising spend, we still captured more leads, booked more sales meetings, and engaged more leads and contacts in comparison to last year, thanks in part to Conversational Marketing.

"Connecting our Conversational Marketing tool to the rest of our tech stack helps us intelligently engage with website visitors, and adds real horsepower to our strategy."

Sarah McConnell
Head of Demand Gen
Qualified

Sarah is a savvy digital marketing and demand gen leader with a track record of joining lean marketing teams to generate pipeline growth. Sarah was an early adopter of Conversational Marketing and has extensive experience across a variety of platforms, but was so impressed with Qualified's product that she joined the team!

How did you decide to get into the world of Conversational Marketing?

It started at my first B2B SaaS role, where we implemented a quasi-Conversational Marketing tool. While it worked well, it lacked in a lot of areas. Since then, I have implemented a handful of other Conversational Marketing platforms and watched the market evolve well beyond "chatbots" and into a marketing channel that drives directly-attributable marketing pipeline and revenue. When the opportunity arose to join a company that was creating a Conversational Marketing platform I really believed in, I couldn't pass it up. I know the impact Conversational Marketing can make for B2B organizations is just starting to be realized, and I'm thrilled to be on the front lines to see it evolve.

Why do you think Conversational Marketing is such a growing trend?

It addresses two root problems sales and marketing professionals have been trying to deal with for years: 1) quantifying marketing spend and 2) generating *quality* leads in sales reps' pipeline. Conversational Marketing simultaneously solves for both of these.

If a lead reaches the site from an ad, it helps track a user's behavior through conversion. This helps marketing prove their ad spend is actually contributing to pipeline and revenue. Plus, Conversational Marketing helps sales reps see all the leads visiting their website, prioritize who is most important, and strike up real-time conversations at the exact moment the lead is showing high intent. It's a win-win for both teams.

What are some top-performing Conversational Marketing experiences you use at Qualified?

We have about 80 different experiences that run at any given time, but our "competitive differentiator" bot is tremendously valuable.

We noticed people who were doing competitor research stayed on the site for a long time. Since Qualified is relatively new to the market, we need to explain to our prospects what sets us apart.

In response, we created a competitive differentiator experience that uses Qualified's chatbot to offer quick bullet points about who we are, what we provide, and what sets us apart from our competitors. At the end of the experience, we offered to connect them to a rep if they wanted to learn more. Since launching this new experience, we've noticed prospects are engaging with the bot at a really healthy rate.

What are some of the biggest learnings you've had in your Conversational Marketing journey?
First, use data as much as you can to help determine which phrasing, offers, images etc. perform best. We often think we know what users want to receive, but we need data

to gut check these assumptions. Plus, data learnings can help guide other marketing initiatives. For example, we run a "test drive" experience that lets users self-select from the pain points we believe are top of mind for our buyers. We can monitor how the experience is performing to see which pain point is resonating the most, and work that language into the rest of our marketing strategy.

Second, map out your experiences before you build them. It's easy to get excited and start building in the platform, only to realize you have 20+ branches and you can't remember how they work together. Conversational Marketing gives you the power to get very personalized with your experiences, so the more complex you make them, the more important it is to map out logic .

"Conversational Marketing helps sales reps see all the leads visiting their website, prioritize who is most important, and strike up real–time conversations at the exact moment the lead is showing high intent."

Meet Qualified

The leading Conversational Marketing platform for Salesforce, designed to help you engage and convert your target buyers.

Trusted by the world's leading brands

Adecco   bitly   workfront   SurveyMonkey

IMD   ringDNA   aws

Gamma   ThoughtSpot   Brandfolder   ZERO MOTORCYCLES

InsideView   valpak   atspoke.

talkdesk   AGIO   JUMIO   Staffbase

The trusted enterprise platform

SOC 2 CERTIFIED   GDPR COMPLIANT   ISV CERTIFIED   99.99% UP TIME

◆ QUALIFIED