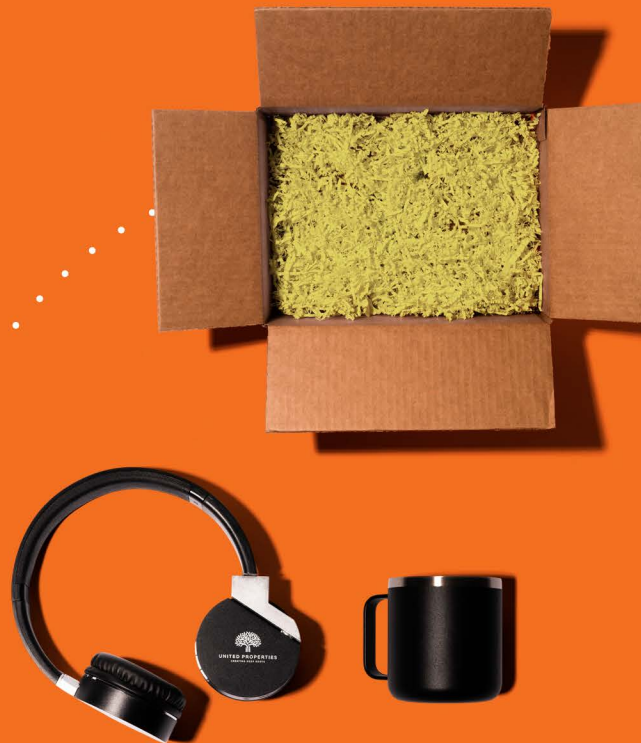


# OUT OF THE BOX

Creative ABX Campaigns for Marketing, Sales, and CX

Hey Emily,  
Our chat sounded great.  
Looking forward to  
working together soon!  
Thanks,  
Rebecca



Featuring successful, real-world campaigns from leading software solutions.



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# Being bold, creative, or unique used to be a nice-to-have.

But in a world of economic uncertainty and limited in-person interaction, it's a necessity. 2020 has ushered in a new paradigm, forcing companies to evolve beyond just "spray and pray," set-it-and-forget-it, and many other traditional "lead generation" tactics.

What hasn't changed is that creativity always wins. In a survey of more than 1,500 chief executive officers from 60 countries and 33 industries, IBM found that creativity was ranked as [the number one factor](#) for future businesses success. Why?

**Creativity helps teams adapt to ambiguity and change**—something we have seen a lot of in this year (and we have no way of knowing when it will end). Yes, creativity is about originality in your ideation. But it's also about problem-solving; designing and building new systems; divergent thinking and even, sometimes, breaking systems. Personalization may grab someone's attention, but creativity will win their heart.

But why now? Many of your competitors will likely take a "wait and see" approach in difficult times. That helps you have an opportunity to stand-out from the crowd, fill the vacuum, and experiment with new ways of reaching prospects and customers.

There is also the risk that your competitors see this opportunity and, if they're the ones engaging with your prospects and customers through this uncertain period, your competitors will be in a stronger position when the buyers are ready to buy. Now is the time to strike.

So, how do we actually **think outside the box**?

That's the question we set out to answer. First, we looked into the processes our internal teams use to stay creative. You'll find our "Out-of-The-Box Thinking" chart we crafted based on that at the end of this guide.

More importantly, we turned to our colleagues at companies we admire. We were curious how they're getting creative with the tools and tactics available to them in order to craft a cohesive online and offline journey that keeps audiences engaged.

And we weren't disappointed. In this guide, we offer ten examples of successful multi-touch campaigns from companies that got creative with their tech stack, messaging, channels, and more. We hope you find these stories insightful and actionable.

Remember, the best companies leave nothing to chance. Good luck and happy sending!

# Increase Responses Across the Entire Customer Lifecycle

## Bombora + Sendoso

In a world that demands more sustainability and budget accountability, Intent data is your secret to confidently delivering Account-Based Everything (ABX) more effectively. From knowing which accounts to target with display ads, to surfacing in-market accounts for sales teams, to expanding customer relationships, Intent data is your empirical guide on where to focus your budget and energy.

Intent data is generated from business users' online content-consumption activities. It's aggregated and modeled to provide B2B marketing and sales teams with insight into which organizations are increasingly researching their product or service categories, and to what extent. The most reliable and compliant Intent data is gathered from a co-op of online sources including publishers, research firms, tech vendors, agencies, and event firms and factors in the context of topics rather than merely the presence of keywords.

# Bombora + Sendoso

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## The Play

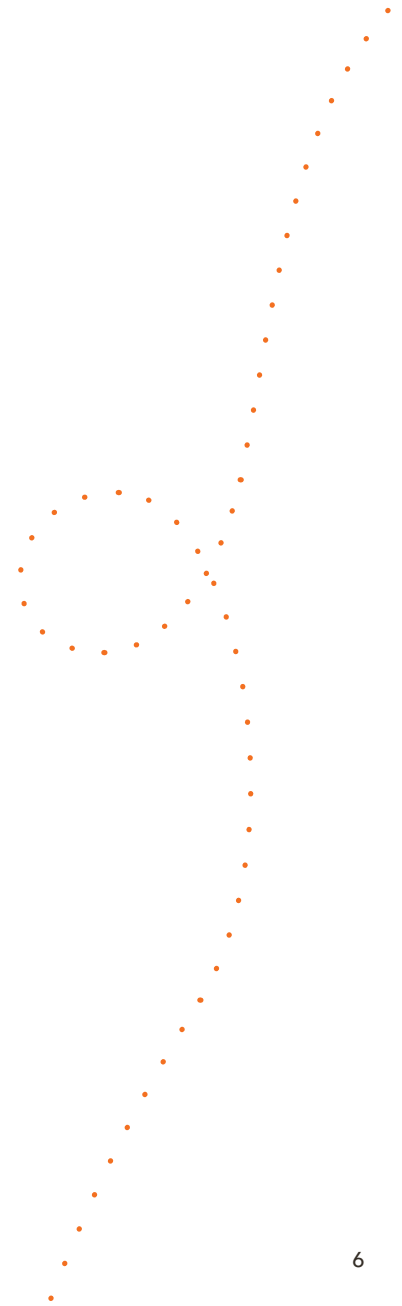
As mentioned previously, finding the right accounts to target is critical to finding ABX success, especially when incorporating expensive tactics like direct mail.

Starting at the top of the funnel, marketers should use Intent data to identify accounts that are in-market for their product or services—even if the contacts at those accounts are still anonymous. This list of accounts can be cross-referenced with other existing account lists, for example one from sales, to determine the best accounts for direct mail outreach. After identifying the most relevant contacts for a send, Intent data will also give marketers clues about what messaging will resonate with the recipient, which is helpful for segmentation when multiple campaigns are at play.

Sales reps should also use Intent data to guide their prospecting strategy. Here's an example of how Frannie Danzinger, VP of Sales for Strategic Accounts, uses Intent data in her process:

- I have a broad list of assigned accounts within a territory. Other than ICP and some miscellaneous tools, there is no real way to prioritize accounts.
- Every Monday, I check my report of accounts showing Bombora Intent to help prioritize with my overall account prospecting strategy. I bucket these accounts according to their topic interest and interest level, and build my outreach cadence based on topic interests.
- For accounts showing a high level of research on lower funnel topics or Integrate competitors, I plan a direct mail send (using Sendoso) to get their attention, and show I'm willing to invest in the relationship because I can help them run a more effective and efficient demand engine. Some of my favorite sends are personalized gifts like a coffee mug from their alma mater, a fitness class subscription, or local fresh baked cookies.

When Frannie sends direct mail to accounts signaling intent, she typically sees **an impressive response rate of greater than 50%**.



# Bombora + Sendoso

ABX doesn't stop once an account becomes a customer. Here at Bombora, Cydney Eldh, Director of Enterprise Customer Success, keeps a close eye on each of her accounts via the Bombora Salesforce Integration. She checks the following two reports every week:

- Accounts signaling interest for a product or integration they haven't yet purchased: This report is Cydney's ticket to meeting her upsell or cross-sell quota. She'll take insights from this report to schedule lunch-and-learns with the customer. She used to send lunch to their office, but with many people working remotely, she now sends a GrubHub or Uber Eats eGift card via Sendoso. Customers love that Cydney always knows what they need to get more value from Bombora products.
- Accounts researching Competitor topics—this is the “red flag” report. Accounts popping up on this list are deemed a possible churn risk, because they appear to be researching competitor products. When an account is on this list, Cydney knows she needs to connect with them ASAP to reinforce the trusting relationship and identify any pain points. A small “thanks for being a customer” gift usually helps too.

## The Takeaway

To get the best results from ABX, it's best to let Intent data be your guide throughout the entire customer journey.

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### About Bombora

Bombora is the leading provider of Intent data for B2B sales and marketing. Bombora's data aligns marketing and sales teams, enabling them to base their actions on the knowledge of which businesses are actively researching what products, and the intensity of that consumption.

Uber Eats



## Incentive Account Engagement and Content Downloads

### Zoom + Sendoso + Positivity!

Heading into 2020, we were focused on learning from all of the awesome things we did in 2019, doing more and better versions of what worked, and leaving behind tactics that maybe weren't so great in hindsight.

At Ambition, we know that when revenue leaders have real-time visibility into individual and team performance, there's more energy on the sales floor, there's more accountability to hit goals, and there's measurable, predictable growth.

However, three months into 2020, not only were we working 100% from home, but our customers were too, and the sales floors were a distant memory. A few months into the lockdown, we started to run some numbers to see where we needed to be spending our energy and our dollars. Lo and behold, throughout our entire funnel, we saw that Enterprises were pulling out ahead as the clients most likely to be experiencing the pain we were primed to solve.

Our largest clients, many of whom were enthusiastic fans before, were now prioritizing Ambition ahead of every other strategic initiatives because they were able to efficiently and accurately keep hundreds or thousands of employees aligned and pacing to win.

But, much like our Enterprise friends, we found ourselves needing to shift our marketing and sales strategies, too. With new buyer personas to woo, new assets needed to enable our SDRs and AEs, and a webinar-fatigued pipeline, we knew we needed to finally get serious about ABX.

Introducing . . . "5 in 10: Crucial Convos For Busy Sales Leaders In Uncertain Times."



# Ambition: Zoom + Sendoso + Positivity!

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## The Play

At its core, 5 in 10 is a way for us to get bite-sized, targeted content to our audience and to enable our sales teams as they sell to Enterprise accounts. However, it also serves as a way to get in front of some of our best Enterprise customers, prospects, and their friends. The format is five 10-minute videos spanning six different topics—sitting behind six individual gates—important to Enterprise buyers reeling from the suddenly-remote shift.

At the end of the series, we'll have a library of over 25 videos featuring customers, partners, prospective customers, and some of our favorite Enterprise thought leaders. By partnering with other SaaS vendors, we are ensuring we also get this content in front of their audiences to drive net new leads. And, by inviting non-customers in our ICP to weigh in, we're also establishing connections with individuals in target accounts.

The physical impression comes after the initial interview is done. It's not the punniest choice, but, we found, cookies are the sweetest way to say 'thanks'. By asking for each speaker's home address in order to send them a 'thank you' for their participation in the series, we're also gathering a valuable data point that will allow us to surprise and delight them later on with additional, targeted physical impressions when they aren't expecting it.

If they're not already a customer, after each video is edited, we send the edited video, copy our SDR Team Lead and transparently ask for a meeting. Conversely, if they're already in the buying process, we copy in Matt (our Enterprise Account Director) to talk to them and keep the conversation rolling or close the loop.

# Ambition: Zoom + Sendoso + Positivity!

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## The Takeaway

Right now, we're halfway through launching our series, and early returns are thrilling: We've already secured multiple meetings with some seriously impressive target buyers, we've gotten enthusiastic, organic social love from interviewees, and we're on track to hit over **2000 content downloads** (with no signs of stopping).

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### About Ambition

Ambition is the #1 Sales Gamification & Coaching Software. We provide the tools world-class clients like FedEx, Waste Management, ADP, and DocuSign trust to boost visibility, sky-rocket productivity, and create a nobody-misses-a-goal culture of sales excellence.



## Drive Virtual Event Attendance and ROI

### ON24 + Sendoso

In a digital-first world, engaging buyers has never been more challenging. To keep pace with evolving audiences and the unique circumstances of our time, marketers are evolving their traditional account-based marketing initiatives into ABX programs, and thinking “out of the box” (see what we did there) in search of creative ways to humanize their approach to engaging audiences and driving revenue.

# ON24 + Sendoso

## The Play

To help marketers navigate these changes, we utilized our own marketing platform to host “Virtualized,” a digital summit jam packed with keynotes, breakout sessions, and certification courses designed to help participants keep pipeline flowing in a digital-first world. There were networking opportunities via an invite-only Slack channel and Q&A sessions via the ON24 Engagement Tool.

But what would a digital experience be without a physical touchpoint? To add an approachability factor and leave a “physical impression,” we invited select registrants to join us for a pre-event coffee brewing masterclass during which world-champion brewmaster, Erika Liftee, gave participants an expert tutorial on the art of brewing and the history of coffee. Using Sendoso’s custom box feature, we sent participants everything they needed to brew the perfect cup o’ joe, including a dripper, mug, and ready-to-pour-over beans.



## The Takeaway

It's never a bad time to get serious about your at-home barista skills, but that's not the only reason we chose to engage our virtual guests in this way. Our goal was to drive engagement and encourage registrants to attend the "Virtualized" Summit.

The result? **81% of registrants who attended the pre-event experience went on to attend "Virtualized,"** and **41% of those attendees scheduled a demo.** Not too shabby.

Connecting with audiences in a digital world means stepping out of our comfort zones. Old ABM tactics and mediocre content experiences just don't cut it anymore. The good news is there are so many creative ways to build relationships with buyers at every phase in their journeys and deliver online experiences that convert. By creating an exclusive, pre-event digital experience and including a "physical impression," we were able to nearly double attendance rates to their virtual event and, in turn, drive pipeline and revenue.

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### About ON24

ON24 is on a mission to transform the way businesses engage with their audience, powering interactive, data-rich digital marketing experiences that drive a resilient revenue strategy. Through the ON24 Platform, marketers can create and deliver live, always-on and personalized webinar, content and virtual event experiences, and capture audience behavior to turn engagement into actionable data. With a digital experience taking place every minute, ON24 is the network where a half million professionals engage every day for a total of 4 billion engagement minutes per year. Headquartered in San Francisco, ON24 has a wide global footprint with eight offices in key regions, including London, Munich, Singapore, Stockholm and Sydney. For more information, visit <https://www.on24.com>.



## Create Engaging Virtual Event Experiences

### Sendoso + Zoom

As a company that provides quota-based outsource sales and marketing, MarketStar, a Sendoso customer, targets top sales executives at enterprise-level companies. Their audience has very little spare time to take meetings and because of this, they brought on Sendoso to help them gain the attention of buyers. They use Sendoso to bolster their one-to-one ABM campaigns, and more recently, they've been working with Sendoso to create memorable remote events.

Senior Manager of Demand Generation & ABM Amy Wilde and Business Development Manager Maci Scheer are tasked with generating and nurturing leads from companies that typically have \$250M-\$1B in revenue. They were looking for a memorable and exciting way to get in front of their buyers virtually, so they decided to run a virtual wine tasting via Sendoso's partner, In Good Taste.

# Sendoso + Zoom

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## The Play

The MarketStar team didn't want to send a mass email inviting their top prospects to the event, opting instead to send a personal email message to each invitee. Once people registered, they received two email reminders with content one week before and the day of the event. They also received a box via Sendoso with eight mini bottles of wine to sample during the tasting.

In Good Taste events are held over Zoom. Once attendees login, they are then taken through a 30-minute tasting experience by the representative from In Good Taste followed by a networking happy hour. Prospects enjoyed the experience so much that they didn't want to leave! And the MarketStar team received a lot of positive feedback from attendees.

The goal of the event, itself, was not to pitch MarketStar, but to give attendees a fun experience and escape from their day to day. After the event, they sent a follow up email with eight pieces of content (to correlate with the eight wines that were sampled), as well as an ask to continue the conversation and take a meeting with their sales team.



# Sendoso + Zoom

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## The Takeaway

MarketStar's prospects loved the unique experience that the virtual wine tasting provided. They saw an **88% attendance rate and booked five meetings since the event**. Because of the great response they've seen, they're now planning to run a customer-focused version of the event in the future.

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### About Sendoso

Sendoso, the leading Sending Platform™, is the most effective way for revenue-driving teams to stand out with new ways to engage at strategic points throughout the customer journey. By sending personalized gifts, branded swag, and eGifts at scale with Sendoso, you'll see significant time savings per campaign, an increase in conversion rates, and higher retention rates.





## Generate Marketing-Sourced Revenue with Target Accounts

### 6sense + Sendoso

Today's sales teams can't possibly engage at scale with the level of personalization that is now required—without the help of AI.

Tipalti, an end-to-end accounts payable software solution that automates the entire supplier payments operation, has helped transform their sales team's efforts by using the combination of 6sense and Sendoso to massively scale their personalized outreach. With the ability to identify buyer intent signals, both on Tipalti's sites as well as on third-party websites, the Tipalti sales team has taken their prospecting efforts to the next level.

As a fintech business that provides consolidated accounts payable and remittance automation services, Tipalti targets a combination of industries highly specific to their business. In order to ensure their outreach efforts are highly personalized, they needed more comprehensive data than what was available in their CRM.

# 6sense + Sendoso

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## The Play

6sense enables Tipalti to launch an account-based program where sales uses predictive insights to hone in on in-market accounts, while marketing pushes accounts down the funnel through targeted display—and they're leveraging the power of AI to do it all at scale.

The Tipalti sales team leverages 6sense data and insights on a day-to-day basis to map out their actions. When they're prospecting into a specific account and want to understand how and when key personas within the account are engaging—and where the activity is coming from—they are able to triangulate the key personas to reach out to, as well as use the engagement timeline to analyze recent spikes in activity. The intent keywords captured by 6sense enables reps to tailor personalized outreach.

Tipalti has also built a suggested content matrix for the sales team to refer to when an account is researching a particular keyword. The matrix contains specific pieces of content to send based on the intent keywords being searched, allowing the reps to craft personalized messaging according to what their prospects are researching.

Twice a quarter, marketing and sales work together to select a list of their top 100 accounts using 6sense predictions like buying stages and intent scores for a one-to-few ABX campaign.

Once an account is identified as engaged, Tipalti leverages Sendoso to create personalized door-openers for their sales team, ensuring their messaging is eye-catching and relevant to the prospect.

## 6sense + Sendoso

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### The Takeaway

As a result of using 6sense and Sendoso, Tipalti has closed nearly **\$2M in marketing-sourced opportunities**. And in one quarter alone—Tipalti generated **11 opportunities**—two of which were some of the **largest deals that quarter**.

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#### About 6sense

The 6sense Account-Based Orchestration Platform helps revenue teams identify and close more opportunities by putting the power of AI, big data and machine learning behind every member of the B2B revenue team, empowering them to uncover anonymous buying behavior, prioritize fragmented data to focus on accounts in market, and engage resistant buying teams with personalized, multi-channel, multi-touch campaigns.



## Drive New Logo Pipeline and ROI with Target Accounts

### Outreach + Sendoso

Who says Valentine's Day is just a holiday for romance? Not Outreach! Our team created a direct mail play designed to set new logo meetings and generate new pipeline by surprising our target accounts with a classic Valentine's Day treat.

# Outreach + Sendoso

## The Play

This play required use of both Outreach and Sendoso to execute. Sendoso was used to create/package the gift as well as send to recipients. Once the package was delivered, our team used Outreach to place recipients into a sequence to both confirm the package delivery and complete a CTA to continue the conversation.

In the package were Valentine's Day heart candies in an Outreach branded box that says, "Engage Smarter" (a heart replacing the "A" and "R").

There was also a card that says, "Sales Takes Heart" on the front and "Happy Valentine's Day" with Outreach branding on the back. We even had room to include a handwritten note on the back.

Sales members chose target accounts to send gifts to. They customized the card, catering it to their relationship with the individual recipient.

## The Takeaway

This direct mail play drove **new-logo pipeline among the target accounts** and generated **27X ROI**.

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### About Outreach

Outreach, the leading Enterprise ready Sales Engagement Platform, accelerates revenue growth by optimizing every interaction throughout the customer lifecycle. The platform manages all customer interactions across email, voice and social, and leverages machine learning to guide reps to take the right actions.





## Opening Sales Opportunities with a BANG! (Literally) Sendoso + Outreach + Gong.io

80% of your emails never get opened.

It takes [18 dials](#) to connect with a buyer.

So, yeah, **sales is hard**.

How do you cut through the noise? How do you stand out? How can you be . . . unique?

Here's how we did it.

We leaned on our marketing and sales development teams to break into key target accounts and make use of the Gong name with a fun direct mail campaign.

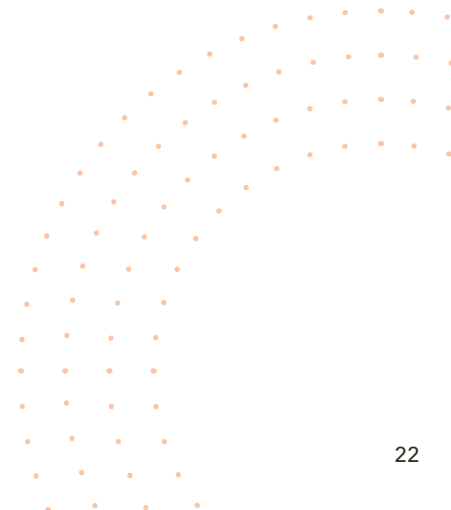
The results were noteworthy:

**400+ opportunities**

**8 (yes, 8) figures in pipeline influenced**

On top of the normal goodies a new Gong employee gets when onboarded we include a mini-Gong they can put on their desks and use to celebrate all their wins.

But wait. **Why should Gongsters get to have all the fun?**



# Sendoso + Outreach + Gong.io

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## The Play

We began sending sales leaders individual mini-Gongs to give to their top rep so they could display them on their desks. The package was delivered in a custom, Gong-designed box with purple crinkle paper, and a handwritten note.

All of this with **NO ASK**.

As soon as the SDRs were notified their prospect received the package, they quickly kicked off a 12-step Outreach sequence. **Timely (relevant) follow up is crucial.** Rather than directly ask for a meeting as reciprocation for the package, the SDRs used the mini-Gong as a conversation starter by asking, “Who got the mini-Gong?”

This direct question compliments the “OMG-I-just-received-snail-mail-experience.” It also empowers the SDR to do more discovery and—ideally—tie everything back to one or more of our value propositions.

**We used this play to create what we call “The Raving Fan” experience—immediately linking Gong to feelings of joy and celebration through the act of physically receiving the mini-Gong. Our SDRs then tied that feeling into one that our customers feel time and time again thanks to Gong.**

Thankfully we drink our own Kool-Aid and use Gong, making it easy to track the efficacy of this play. Gong notified us via email every time an SDR finished a call with one of those target prospects that included a “mini-Gong” and a booked opportunity.

# Sendoso + Outreach + Gong.io

## The Takeaway

- **Be empathetic:** put yourself in the prospect's shoes.
- **Meet the needs of NOW:** how can you impact the prospect's needs NOW, not tomorrow, not next week, and certainly not next year.
- **Be prepared to show value:** combine the previous two points and really show the prospect why them, why now.
- **Over-communicate:** make sure everyone is on the same page.
- **Focus on a singular goal:** sales goals should be your goals and not the other way around.

Get creative.

Have fun.

Create lots and LOTS of pipeline.

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### About Gong.io

Gong.io enables revenue teams to realize their fullest potential by unveiling customer reality. The patented Gong Revenue Intelligence Platform captures and understands every customer interaction then delivers insights at scale, empowering revenue teams to make decisions based on data instead of opinions.





## Increase Opportunity Win Rates with Target Accounts

# TechValidate by SurveyMonkey + Salesforce + Sendoso + Outreach

In a bid to achieve higher pipeline results for our business, our demand generation team was challenged to think “out of the box” with their campaigns.

Since they had traditionally worked with the inbound business development team to generate pipeline for the business, they saw an opportunity to partner with the outbound business development team to execute an orchestrated play across sales and marketing, specifically for one of our products—TechValidate.

### **TechValidate by SurveyMonkey**

Our product marketing team uses TechValidate not only to get customer insights and craft compelling messaging, but also to capture hard-to-get ROI metrics and operational results from customers to build trust with buyers. Specifically, for this campaign, they created an infographic with top 4 ROI stats on how customers have benefited from using TechValidate, and printed it into a piece of collateral that they used in the play.

After identifying the specific messaging for the campaign, the team decided to use direct mail as another channel to break through the digital noise. Sendoso was instrumental in helping the team send out physical boxes as a “welcome package” for the BDRs to open up the conversation.

BDRs at SurveyMonkey rely on Outreach heavily to orchestrate their email sequences to their target prospects. With guidance from Sendoso’s reps, they created a follow-up sequence that kicks off after the box gets delivered.

TechValidate is a software solution that enables organizations to collect and transform customer feedback into compelling case studies, testimonials, reviews, and more—all at scale.

# TechValidate by SurveyMonkey + Salesforce + Sendoso + Outreach

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## The Play

The campaign play consisted of three main steps:

### Step One: Tier Target Accounts and Identify ICP

The success of an ABX campaign hinges heavily on the target account list. On top of the data filters the team had access to in Salesforce, the team went through an account tiering exercise to ensure that they only focused on the accounts that were good fits for TechValidate. The team also went on to identify contacts that mapped well with TechValidate's ICPs.

### Step Two: "Welcome Box" Send

The main message of the campaign was "Amplify the voice of your customers." To play off the theme, the team added a speaker in the welcome box to emphasize the importance of listening—and amplifying—the voice of their customers.

The box also included a personalized note by the BDR, as well as a TechValidate one-pager that showcased the top 4 ROI stats on how customers have benefited from using TechValidate, sourced from TechValidate (of course!).

### Step Three: BDR Outreach

Soon after the boxes were delivered, BDRs began their sequence, starting with a manual email checking in to see if they've received the gift box. In their first few emails, the main messaging was brought through, to remind prospects of the importance of "amplifying the voice of customers." The sequence consisted of a combination of emails, phone calls, and LinkedIn touches over 19 days.

# TechValidate by SurveyMonkey + Salesforce + Sendoso + Outreach

## The Takeaway

Within the quarter, our team saw immediate success in pipeline generated and achieved their pipeline goals. Here are some of the results the team saw:

People loved the personal touch that was added to the campaign with the box and the speakers! Some even took to social media to share their gifts.

By being really selective on the target account list, the team made sure that they only reached out to accounts whom they think were a great fit for TechValidate. As a result, they saw a **6X increase in pipe to spend ratio over traditional demand generation activities**.

Besides attaining the pipeline generation goals, the team saw that by partnering with the marketing team, conversion rates were boosted all the way through to closed won business. The team achieved a **3X increase in opportunities generated to won ratio**, as compared to previous campaigns run solely by the BDR team.



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### About SurveyMonkey

SurveyMonkey (Nasdaq: SVMK) is a leader in agile software solutions for customer experience, market research, and survey feedback.

## Bring Dark Sales Opportunities Back to Life

### Marketo + Sendoso + RollWorks

We get it . . . we're always looking for 'new' unknown folks to lure in and nurture with our marketing and sales tactics. But, what happens to those who we once engaged but then seem to have taken a nap? We devised a play to 'wake the dead', investing in reviving our existing target accounts and buyers to re-engage.

It's a play that costs next-to-nothing, takes only a few hours, and delivers amazing results. Actually, we'll let you in on the real numbers: **\$500, 5 hours, and 10% lift in monthly opportunities.**

# Marketo + Sendoso + RollWorks

## The Play

First, we built our list of target accounts and filtered them based on 'no SDR activity' in the last 14 days, which let us know they are good targets but just may have become distracted.

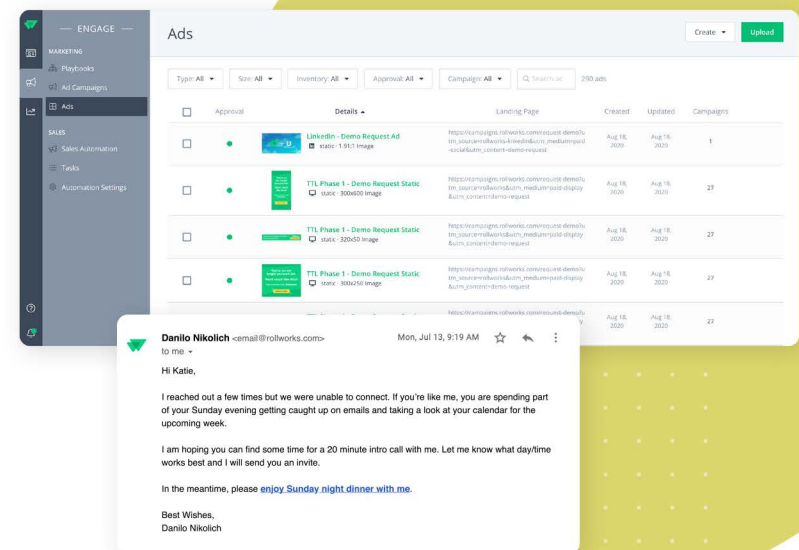
Second, we took this audience and started a one-day-only (Sunday to take advantage of the fact many of us catch up on email/and are online on Sunday afternoons) two-part email and paid ad play:

- Taking advantage of the give-to-get mentality, we sent an email via Marketo with a no-ask Sendoso eGift card sent dynamically "from" the assigned SDR to have "dinner on us" (with a DoorDash gift card).
- To increase email open rates, we uploaded this same audience list into RollWorks and launched display ads asking folks to "check their email" for a special gift.

Finally, we ensured that all our SDRs were on board to follow up on those who did not get back to us immediately (reminding them that there was an eGift at play!)

And just like that, the responses came flooding in (a.k.a we drove **10% more monthly opportunities**).

**Bonus:** The email is triggered based dynamically on recent activity history of the account, which means this lovely little play is the gift that keeps on giving. We have new meetings booked nearly every Monday since the original deployment date!



# Marketo + Sendoso + RollWorks

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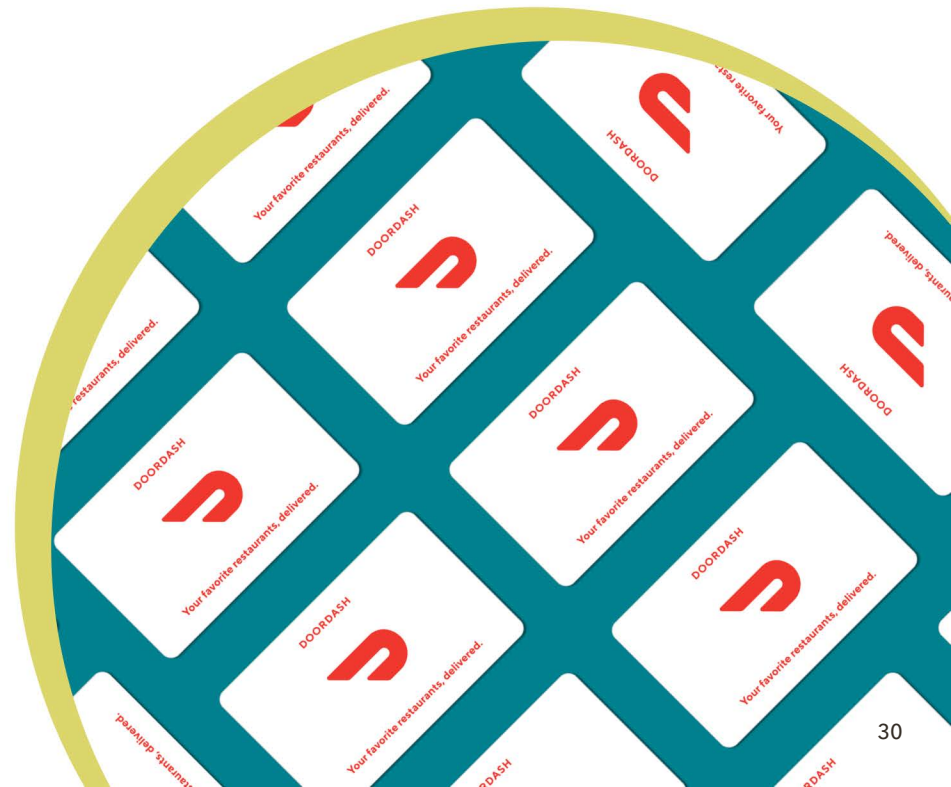
## The Takeaway

We all barely have enough time in our day to plan our next big virtual event program or try to make new buyers excited. Re-engagement is often overlooked, and it's such a valuable pool of potential. Plus, by setting up the email (+ eGift) to send automatically every Sunday, marketers can rest assured that demand will be flowing in without additional resources allocated.

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### About RollWorks

RollWorks, a division of NextRoll, Inc., offers ambitious B2B companies an account-based platform to align their marketing and sales teams and confidently grow revenue. Powered by proprietary data and machine learning, RollWorks' solutions address the needs of organizations large and small—from those with best-in-class ABM programs to those just beginning their exploration. By empowering teams to identify their target accounts and key buyers, reach those accounts across multiple channels, and measure program effectiveness in their system-of-record, RollWorks is an indispensable platform for marketers and sellers who believe that an account-based approach is just good business. To learn more visit [www.rollworks.com](http://www.rollworks.com).



## Intelligently Engage and Delight Top Customers

### ChurnZero + Sendoso

We sought to surprise and delight our growing book of business through a unique, double-pronged approach to gifting. Rather than relying upon a single gift, we chose to reward our most engaged customers with a second gift.

Recipients who submitted a team photo posing with their initial gift received an additional reward. Besides providing a fun touchpoint for our Customer Success Managers, we sought to generate content for Customer Marketing efforts.

Our CS team drinks their own champagne. They use the ChurnZero platform to manage their own book of business. To launch their gifting campaign, the team used two ChurnZero tools:

**Segmentation:** The team easily defined specific groups of customers based on filtering usage data with Segmentation. This allowed ChurnZero to identify their most engaged users and the ideal gifting recipients.

**In-App Messages:** The team effectively communicated with customers as they used ChurnZero with In-App Messaging. Along with segmentation, the team sent targeted messages at the ideal times.

# ChurnZero + Sendoso

## The Play

The campaign play consisted of three main steps:

### Step One: Initial Gifting-Fight Churn Flags

Initial gifting centered around full-sized flags featuring ChurnZero's "Fight Churn" mantra. Sent to new customers on an ongoing basis, these flags embody the spirit (and objective!) of CS teams.

Mailings to these customers included handwritten notes from their ChurnZero CSM that hinted at another additional reward.

### Step Two: In-App Engagement

Following the initial gift, we used segmentation to identify our most engaged recipients. We segmented users by activities like logins and health scores, which became the foundation for rolling out in-app reminders.

Segmented users received reminders that a team flag photo submissions resulted in a second gift (and an afternoon sugar break!)

### Step Three: Final Gifting and Customer Marketing

Upon submitting a team photo, customers were recognized in two ways. First, through a final mailing in the form of a cookie giftbox. This included playful messaging that ties into ChurnZero's tools.

Secondly, photos were shared across social media channels. These led to fun online interactions while serving as social proof of the ChurnZero platform.





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## The Takeaway

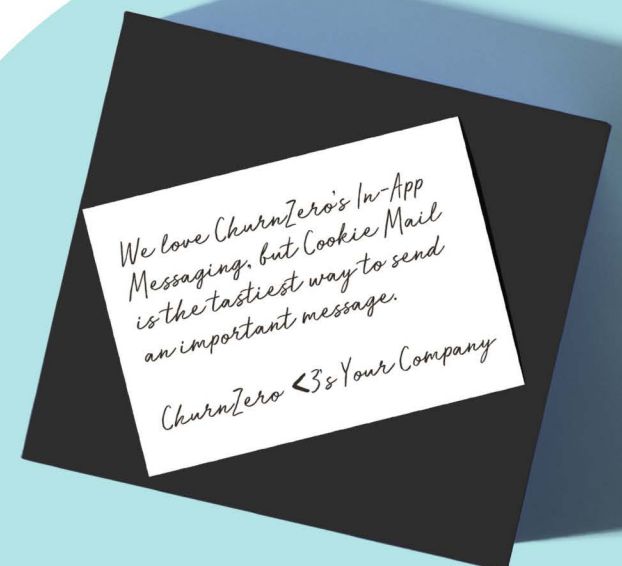
In less than four months, we realized tangible results from a double-pronged gifting approach. **Over 35% of targeted users submitted team photos** which resulted in widespread exposure. These aided in:

- User-generated photo content proved invaluable in our Customer Marketing efforts. Shares on social media resulted in strong engagement (likes, retweets, and reshares.)
- Team photos enabled us to go beyond sharing customer logos in collateral. They provided a human element to our marketing efforts. Customers enjoy learning about fellow ChurnZero users. Prospects find themselves impressed by the logos represented and the passion ChurnZero customers exhibit.

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### About ChurnZero

ChurnZero is Customer Success software for growing SaaS and subscription businesses. The platform is uniquely designed to (1) help businesses understand how their customers use their product, (2) assess their health and their likelihood to renew, and (3) give businesses the means to automate and personalize the customer experience through timely and relevant touchpoints, including in-app content.



## FINAL THOUGHTS

# On Inspiring “Out of the Box” Thinking

As you can see, creativity can be applied to every program, process, and platform that’s at your disposal. It’s more than random acts of imagination: creativity is a muscle you can exercise and tone within your organization every day.

We created this chart with strategies for igniting creativity within your marketing, sales, CX, and other teams within your company. Thanks for reading, and here’s to your future success.

GET ANALYTICAL	GET CURIOUS	GET GUTSY
<b>Dissect your revenue operations.</b> <ul style="list-style-type: none"><li>• What’s working? What should we replicate &amp; iterate?</li><li>• What’s not working? What should we remove or replace?</li></ul>	<b>Challenge your ideas and assumptions.</b> <ul style="list-style-type: none"><li>• Why are we doing things this way?</li><li>• Is there any reason why we can’t or shouldn’t do things differently?</li></ul>	<b>Focus on the wildly important.</b> <ul style="list-style-type: none"><li>• Have the courage to say “no” to everything else.</li></ul>
<b>Monitor macro trends and market data.</b> <ul style="list-style-type: none"><li>• What are your prospects and customers talking about? Your competitors?</li><li>• Where does the market seem to be moving over the next 6-12 months? What does that mean for you?</li></ul>	<b>Be an inspiration “sponge.”</b> <ul style="list-style-type: none"><li>• Soak up ideas from outside of your industry, profession, vertical, or general train of thought.</li><li>• Go beyond just B2B: What can we learn or incorporate from history, literature, economics, “The Office,” our personal lives, etc.?</li></ul>	<b>Make a big (data-driven) bet.</b> <ul style="list-style-type: none"><li>• Be exploration-minded! Why follow the rules when you can discover new worlds?</li><li>• Creativity is not achieved by being timid.</li></ul>
<b>Deeply understand your customer data.</b> <ul style="list-style-type: none"><li>• Who’s engaged and showing intent? Why?</li><li>• Who’s in the sales process? What part [stage] are they at?</li><li>• Who are our most successful customers and why?</li></ul>	<b>Consider all the angles.</b> <ul style="list-style-type: none"><li>• Send out surveys to your field reps to uncover anecdotal or qualitative data that can inform your decisions.</li><li>• Seek out a diversity of perspectives, especially those that may differ from yours from both people and teams.</li></ul>	<b>Love the process!</b> <ul style="list-style-type: none"><li>• The process of doing the work—not the destination—is its own reward.</li><li>• The discovery, the creativity, the figuring things out. The story always happens in the journey, not the destination.</li><li>• Enjoy the process. Appreciate its rewards.</li></ul>

# This Guide is Brought to You By . . .

**Sendoso, the leading Sending Platform™**, is the most effective way for revenue-generating teams to stand out with new ways to engage at strategic points throughout the customer journey. By connecting digital and physical strategies, companies can engage, acquire, and retain customers easier than ever before. Founded in 2016, Sendoso is trusted by over 500 companies and has a vast global footprint, with a presence in North America, Europe, and Asia Pacific. Learn more at [sendoso.com](https://sendoso.com).



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