

 **AWARDS**

**AWARD-WINNING
OPS STORIES**



2022



OpsStars Awards

Recognizing strategic Operations professionals and their ground-breaking innovations to drive pipeline, revenue and propel their company forward in 2022.

We asked Operations teams and professionals to share how they have operationalized processes and strategies to overcome the challenges 2022 has brought with successful outcomes, and we were amazed to see what came back. The challenge for us was determining those who stood up and stood out a little more than the rest.

This collection highlights the stories from the 2022 Award Winners. You can see how they uniquely identified opportunities and solved challenges to find success. We hope you enjoy these journeys from these OpsStars as much as we have.

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Account-Based Program of the Year

An organization or team exemplifying a best-practices approach to account-centric programs with proven success.

The Winner



The Challenge

Recognizing the market demands for a digital-first buying experience, Expedient began a journey to meet buyers during the discovery process and find ways to turn buyer signals into something actionable that would drive revenue and reduce the sales cycle. Despite their ABM sales model, Expedient ran into challenges within the Salesforce ecosystem as well as marketing platforms whose primary focus was on individual prospects. In addition, Expedient's rapid growth resulted in a series of complex account routing rules and service level agreements (SLAs) that became increasingly difficult to build and enforce.

The Operational Approach

Expedient began first by implementing LeanData to address the complex lead and account routing rules. This not only supported their ABM sales model but also addressed the need to cycle leads through complex territory logic and assign them to the right reps for follow up. As part of this solution, Expedient was also able to implement SLAs to improve sales rep accountability.

Expedient implemented 6sense to collect intent data from their website, emails, and keywords on visitors' websites. This account data is filtered through LeanData and used in routing logic. The 6sense qualified accounts (6QAs) are enriched and pull in a buying group of decision makers who are added to Salesforce Sales Engagement Cadences. And sales team members are notified directly in Microsoft Teams when accounts are ready to be worked. With LeanData serving as the quarterback for the majority of this RevTech stack, the process is completely automated.

Operational Results

As a result of Expedient's new integrated approach, they've reduced the time it takes to respond to inbound requests from days to just hours. Nearly 100,000 objects have been routed in 2022 so far, contributing to a significant impact on revenue for both new business and existing customer growth. Expedient can now identify prospects significantly earlier and engage them at an accelerated pace, armed with a more accurate picture of the prospect's intent.

"This has become the gold standard for our organization. It arms the sales team with everything they need to hit the ground running: who to talk to, when to contact them, and what to talk about. It also allows us to automate as much as we need and operate at scale. We have the full support of sales leadership and the revenue operations team. They now see this as a mission critical process."

– Nick Lansberry, Go-to-Market Operations Manager



Buyer Experience Award

An organization or team who has developed a best-practice operational approach to enable a world-class buyer experience with successful business outcomes of improved conversion or revenue.

The Winner



The Challenge

Shopify is one of the most popular online store builders and best-known ecommerce solutions on the market. To achieve additional revenue growth, the Shopify team looked to improve their buyer experience - focusing on customers wanting to upgrade to a higher platform subscription plan. Their existing sales cycle contained multiple touch points with several teams which lengthened the process. This meant customers had longer wait times, sometimes for urgently needed upgrades and services. Internally, valuable time was being spent on manual tasks that could easily be automated, freeing teams for other revenue generating activities.

The Operational Approach

Shopify's solutions centered heavily in automation. One of the first improvements made was the creation of a localized landing page where customers could initiate a plan upgrade simply from signing into their store. Upon selecting an upgrade, another automation would then determine if the shop was eligible and present customized pricing. These

automated processes triggered a lead to be created in Salesforce and routed through LeanData.

With specific rules and criteria setup in LeanData, leads could be auto-upgraded to contacts and create opportunities. These parameters also helped determine which opportunities were eligible for sales commission. There are now automations in place to mark the opportunity as closed won, create contracts, establish billing, and change the shop's subscription plan. In addition, LeanData teams created a custom action node for Shopify that helped associate product records in the auto-upgrade opportunities.

Operational Results

As a result of Shopify's new automations, thousands of new customers have upgraded their platform subscription using this "self serve" funnel since launch. Other benefits include:

- The business saves 5.8 hours of manual process work per upgrade
- Customer time to value increased by 360x, enabling them to onboard to the platform quicker
- Reduced errors because of less human intervention and elimination of complex manual processes
- Each plan upgrade led to 7x-68x more incremental ARR

By implementing an automated solution to the platform upgrade process, Shopify has seen improvements in customer retention, reduced errors from human intervention, and the elimination of complex manual processes.

"This automation helped us resolve some of our business and operational problems. Being a no code platform, LeanData made it easy for us to make changes to our rules and flows and make improvements. The custom node was a useful addition and proved how flexible the platform was and a great automation tool from the long-term perspective."

– Sabrina Lobo, Marketing Technology Specialist



Digital Transformation Award

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

The Winner



The Challenge

Due to unique changes in the cybersecurity space, Saviynt experienced significant growth that required scalable solutions in both marketing and sales. However, the existing tech stack was not working as a cohesive revenue operations engine. The marketing automation platform did not connect with Salesforce properly and as a result, there was no true lead lifecycle process in place.

As the marketing team implemented campaigns, there were significant gaps in campaign analytics and an understanding of funnel metrics. Therefore, it was difficult to determine which channels were creating and driving pipeline. Further, the default routing tools within Salesforce were not sufficient to handle the scale and complexity of Saviynt's use case. Saviynt needed a true digital transformation that would connect marketing with sales and create a lead management process.

The Operational Approach

Saviynt leadership first performed an audit of all processes related to revenue operations, sales development, demand generation, and customer success. Through employee interviews, leadership was able to evaluate technologies used, workflows,

and pain points across the entire go-to-market team. From these insights, they were able to prioritize improving process, lead management, and more insights on marketing programs.

Implementing LeanData's Lead-to-Account Matching improved their match rate by 53% from their prior solution. LeanData's Routing also allowed them to incorporate more complexity into the routing rules, eliminating the amount of time spent by sales researching each lead, and potential re-routing, allowing them to respond to prospective customers more quickly. In addition, new data hygiene practices have been implemented including removing duplicates, correcting routing errors, eliminating bad data, and correcting data formats.

Marketing attribution was implemented to track the buying journey and understand what types of activities are creating pipeline and accelerating pipeline down the funnel. Now they have a 10,000 foot view of all marketing efforts which has become critical to understand what is working and what isn't.

Operational Results

Saviynt is now using new technologies to drive insights and become more efficient. With automations in place for lead management, data hygiene and marketing attribution, employees are focused on the right revenue-generating activities.

Measurable benefits include:

- 53% increase in lead-to-account matches
- Increases in lead connect rates
- Ease in updating and reviewing lead routing workflows
- Less time wasted researching and routing leads
- Better analysis of less engaged accounts and insights on what marketing plays to initiate

“With growth comes business challenges that require scalable solutions and processes to equip marketing and sales as the company grows. Marketing is a major revenue driver for the company, so it's critical to have the proper tools in place to drive efficiencies across the go-to-market teams and provide data and insights to help make decisions. It's been a journey and I believe what we've built here at Saviynt can be repeated at any other company to drive similar success.”

– Anthony Valles, Head of Marketing Ops



Go-to-Market Agility Powered by Operational Excellence

With the market in a state of constant change, Sales and Marketing leaders are rapidly reinventing both short- and long-term go-to-market strategies. This award recognizes one operations team and its standout ability to help an organization nimbly pivot to successfully meet new market realities.

The Winner



The Challenge

In April 2021, SaaSOptics and Chargify were purchased by Battery Ventures to go after the mid market, B2B FinOps space. Bringing together two companies with distinctly different processes posed an interesting challenge as decisions needed to be made regarding processes, technologies used, and go-to-market strategies.

On the technology front, there were two Salesforce instances, two marketing automation platforms, two different marketing funnels, and a slew of other RevTech tools. One sales team was fully outbound, the other was fully inbound, yet both were competing for the same companies on deals. Not to mention, there were different go-to-market philosophies in play: product-led growth (PLG) versus sales-led growth (SLG).

To further complicate the situation, the platforms themselves were built on different programming languages. These two organizations needed to combine teams, unify the GTM strategy, and grow into one company, Maxio.

The Operational Approach

To implement such all-encompassing changes, Maxio began with the sales teams. Formerly inbound sales teams were trained in outbound motions with multiple tools to support. With no possibility of combining two Salesforce accounts, Maxio created a data flow and linked forms between the two using Zapier.

Next, selecting one primary Salesforce account, data processes were put into place over the course of six months. With a lot of trial and error using Dataloader, leads, activities, files, and accounts were imported into the new primary Salesforce account.

Maxio relied heavily on LeanData and Zapier to keep marketing funnels and lead distribution working as intended. With two strong brands, it didn't make sense to have one marketing funnel, so Maxio built processes that allowed them to route based on lead origination, teams, and funnel management.

With a website launch planned for September 2022, Maxio will be using LeanData to route three brands until they sunset Chargify and SaaSOptics. By combining tools, bringing in new tools, and training teams to use everything in their stack to their advantage, Maxio can now focus on what's most important: prospects and customers.

Operational Results

Maxio team members will fully admit that not every decision made during the transition was the right one, however their ability to pivot, reestablish processes, and grow showed grit and determination. Overall, the changes across all teams have brought measurable positive results:

Measurable benefits include:

- Service level agreement time has decreased from 1-2 days to 1 hour
- 2x increase in BDR closes from the BDR motion
- 40% increase in meeting show rate
- 35% increase in customer retention rates
- 10% increase in close rate
- 15% increase in inbound pipeline by automating inbound processes
- 35% increase on outbound pipeline by moving the Chargify BDR team to inbound plays to initiate

“All these processes and changes were done by a fast moving agile RevOps team. We started as a small team and expanded across RevOps and Data roles. This team has been given the responsibility to be the catalyst for change and the reliable source of truth. And we are just that. We would not be able to move as fast as we have if it was not for the respect we have among the Executive Leadership, stakeholders, and company. The teams are now all combined and working together to bring the Maxio vision to reality and the results have been AMAZING.”

– Trent Allen, RevOps Manager



Lead Management Program Transformation of the Year: Emerging Enterprise

An operations-led initiative that drove transformational change in the people, process and technology of the lead management engine to improve speed, accuracy and agili-ly lead distribution and response.

The Winner



The Challenge

Everbridge, a critical event management platform used by 6,300+ global organizations, was experiencing multiple inefficiencies in their lead management process. With routing systems housed in two different platforms and owned by two different teams, a variety of problems arose with leads. Despite 100+ Salesforce rules and 30+ Marketo programs, neither platform could support Everbridge's complex logic rules. Plus, the two routing platforms made implementing an ABM strategy difficult as sales team members had limited visibility into accounts.

Additional lead management issues ranged from record duplication to lost leads to uneven lead distribution. Sales team members were spending valuable time manually matching leads or creating new accounts resulting in an even more inaccurate database. Leads were not being nurtured and moved through the flow because of inactive owners and erroneous object reassignments. Even the process of recycling inactive records was being done manually. Ineffective lead management ultimately impacted forecasting, which in turn made future planning and decision-making difficult.

The Operational Approach

Everbridge recognized the importance of one platform that could support the company's complex needs. Implementing LeanData Matching and Routing, Everbridge can now build and manage logic in an all-in-one FlowBuilder, making it

easier to troubleshoot and manage. All updates are made in real time. The former manual process of recycling inactive records has been replaced by an automated scheduled job in LeanData.

To solve uneven lead distribution, Everbridge has incorporated a round robin routing solution. In addition, by implementing an SLA notification flow, leads now undergo timely follow-up or route to an escalation policy that reroutes unworked leads and contacts.

These new lead management processes have automated manual processes and simplified routing logics for territories.

Operational Results

Everbridge experienced positive outcomes for both internal teams and customers. For BDRs and sales team members, leads are now distributed evenly, according to territory management rules, while accounting for time zones and holidays. Leads are sent to the right owners at the right time. Team members have greater visibility into the account database and the data itself is cleaner.

Other measurable results include:

- 5 hours per week saved by BDRs due to the elimination of manual lead management and routing, resulting in quicker response times and faster conversion rates
- 50% reduction in time savings for the Marketing Ops team in maintaining lead routing
- 30% reduction in lead management troubleshooting due to detailed audit logs
- Time and money saved by not developing a custom, in-house routing solution
- SLA is now tracked on every cadence to ensure prompt follow-up

With an enhanced lead management process in place, customers benefit from an improved buying experience as high value prospects are moved through the pipeline faster.

“With many new updates and improvements to LeanData, we’re looking into other areas like 6sense integration or the deduplication features to take further advantage of this powerful tool.”

– Hang Nguyen, Marketing Operations Specialist



Lead Management Program Transformation of the Year: Large Enterprise

An operations-led initiative that drove transformational change in the people, process and technology of the lead management engine to improve speed, accuracy and agility lead distribution and response.

The Winner

DELL Technologies

The Challenge

With existing software and processes causing slow lead routing times, duplicate leads, and long waits for routing changes, Dell Technologies wanted to upgrade their lead management system. However several issues created barriers to automation.

Dell's 10+ year Salesforce instance was weighed down with technical debt and over-customization. This caused slow page load times, performance issues, and problems with software upgrades. In addition, their Salesforce instance contained complex custom code which housed lead routing logic that only a few people understood. When a change in logic was needed, Marketing Ops team members had to work with IT to request the change. And with routing logic going through IT, individual changes would be implemented without being fielded by related departments to ensure it complied with global processes and best practices. Manual and redundant routing measures became the norm due to regional logic exceptions and, as a result, leads were taking much longer to get to the Sales Team.

Further complicating these issues, Dell was using products and tools outside of Salesforce for automation, making it difficult to troubleshoot between the platforms and produce solutions quickly.

The Operational Approach

Dell decided on the implementation of LeanData to allow the business, Marketing Ops, to make modifications to the Lead routing logic whenever changes were needed, rather than IT. Next, marketing automation was moved into Salesforce with

LeanData routing logic handling all processes surrounding lead management. The business transformation began with extensive tool evaluations, training, user acceptance testing and other requirements gathered from across the Marketing organization to ensure the accuracy of the newly established lead routing logic.

Using LeanData, Marketing Ops now had greater control over routing decisions, eliminating inconsistencies across regions, and allowing for a global process to be established for all leads. With LeanData's audit log, Marketing Ops could quickly pinpoint and correct any routing issues. LeanData also facilitated an automated mapping of leads to accounts working seamlessly with Dell's internal customer engagement platform. The scope of LeanData allows Dell to rethink how Leads are handled, even beyond Lead routing.

Operational Results

Dell describes the benefits of using LeanData as "astronomical". They can now provide data-rich leads to sales in an amount of time previously thought to be impossible. LeanData allows reps to have high priority leads in a matter of minutes, while concurrently matching Leads to existing accounts, making sure the leads are not spam, and updating the localized monetary currency based on the Lead's geographic location. The transformation has increased sales revenue, decreased lead routing time, and allowed for better collaboration between Sales and Marketing. It has also provided opportunities for flexible lead solutions and freed up bandwidth and resources within the IT organization.

Dell's Salesforce instance can also breathe easier now as 10+ years of technical debt and custom code have been removed. LeanData has enabled Dell to have precise routing logic, despite being a massive company with thousands of leads coming in daily from multiple sources. With over 25,000 sales reps spanning across the globe, LeanData gets the leads into the hands of these reps almost instantaneously.

"This lead automation project has completely transformed Dell's lead management processes by moving from slow, manual work to streamlined, automated functionality. By optimizing lead routing logic, Dell has been able to implement global rules across all regions, driving standardization in best practices, privacy, and customer experience."

– Zach Olson, Senior Analyst, Lead Automation



Most Cutting-Edge Ops Program of the Year

An individual or team on the cutting edge of innovation in modern go-to-market operations demonstrating forward thinking solutions across people, process and/or technology resulting in real business impact.

The Winner



The Challenge

The go-to-market revenue team at Similarweb is the largest team in the company. However, the company recognized that performance was predicated on being fully staffed with highly-skilled and tenured team members. Simply, the success of the team was dependent on the makeup of the team. Management recognized its need for a systemic solution to best manage workforce planning, workforce training and development, work tools with respective budgets, and performance management.

The Operational Approach

Similarweb created a suite of integrated tools to optimize and predict the go-to-market team's yield and growth. These tools provide easily accessible and transparent data on revenue team performance, including the identification of strengths and areas of continuous improvement opportunities.

The new tools include a scoring system that creates alerts for various types of employee performance risks. Data is then shared with managers, giving them the ability to control headcount in a financially sound manner while the company scales.

Operational Results

Because of this unique custom solution, Similarweb now has the ability to predict and forecast risk and opportunities associated with the go-to-market plan. Their workforce management insights have become the main KPIs in go-to-market metrics including headcount status, headcount retention, and headcount performance.

Other measurable results include:

- 95% accuracy in revenue forecasting when adjusted for headcount forecasting
- 92% of sales representatives who scored at risk were terminated
- Reductions in headcount gaps
- 30% cost savings in the company budget
- 40 positions cut due to the elimination of duplicate positions misaligned across departments

“In order to hit targets, the success of the go-to-market team depends on the right people with the right seniority and performance. Before we implemented this solution, our company never had a way, or one source of truth, to align and aggregate on headcount data, or efficiently analyze and monitor our headcount trends and performance.”

– Limor Tzach, Business Analyst



OpsStar of the Year

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

The Winner



Travis Henry
Director, Sales Development
Operations and Enablement



The Challenge

Snowflake, the Data Cloud company, enables thousands of the world’s largest businesses to mobilize their data for business value. Snowflake was growing at an accelerated pace after going public in 2020. While looking to nearly double the sales organization globally, they were also increasing quotas for their Sales Development teams and needed to increase the pipeline influenced by that organization.

With this growing workforce, many processes needed to be automated and refined to keep the momentum going between the ABM, Demand Generation, Marketing Operations and the Sales Development teams. Capacity planning, operational processes, promotions and optimization were all needed in order to align and scale.

The Operational Approach

Taking a very methodical approach to Snowflake’s goals, Travis Henry, Director of Sales Development Operations and Enablement, hired the right people, created project plans and managed expectations across cross-functional initiatives with his SDR Ops team.

To increase pipeline, Travis worked across teams to implement a proprietary lead scoring machine that triggered

automation within Salesforce to manage inbound leads. This came with a total overhaul of LeanData lead routing, a massive shift in Marketo, and a full overhaul of Salesforce automation related to the Lead, Contact, Campaign and Account objects. The result was a highly predictive and agile inbound machine leveraging the best of machine learning in Snowflake with the extensibility of Salesforce.

Travis also established a content committee to build Outreach sequences aligned to ABM initiatives and was the key facilitator in activating SDRs against target accounts. This balanced the goals of standardized, measureable messaging with empowering reps to personalize their outreach.

Last, Travis oversaw changes in the learning management system, transitioning all onboarding material, ongoing enablement content, certifications, documentation and resources to a new system now implemented by Snowflake’s global learning and development team. He and his team shifted the focus from simply ramping new hires to supporting the full development cycle of an SDR at Snowflake.

Operational Results

With Travis’s support, Snowflake has seen positive growth quarter over quarter since the beginning of 2021. The 230+ SDR team has partnered with Marketing on solid outbound strategies that have helped SDRs reach their goals at 100%+ achievement in all global theaters. Go-to-market motions are now unified across the SDRs, marketing, and the field sales teams that they support.

New milestones include:

- 86% of SDR meetings are in ABM target accounts
- 43% meeting rate of accounts targeted versus meetings booked
- Outbound sequences perform above industry averages

“Travis has been instrumental in ensuring all the necessary departments find scalable ways to manage the organization structure and processes related to hiring, offboarding, tech management, analytics, onboarding, performance management, enablement strategy, messaging and content. Travis touches every part of the business. The challenges were identified only because he knew where to look.”

– Lars Nilsson, Vice President, Global Sales Development

The logo features a yellow star on the left, followed by the text 'OPS STARS' in white, with 'OPS' stacked above 'STARS'. To the right of this is the word 'AWARDS' in a large, bold, white sans-serif font.

OPS STARS AWARDS

**Thank you for your interest in our 2022
OpsStars Awards Winners!**

To learn more about OpsStars, visit ops-stars.com.

About LeanData

Today's growth leaders are powering their B2B selling with LeanData, the gold standard in modern revenue orchestration and an essential element of the modern RevTech stack. The LeanData Revenue Orchestration Platform, powered by No-Code Automation, simplifies and accelerates coordination of all the plays, people and processes needed to transform buyer signals into buying decisions. LeanData is inspiring a global movement among its 800+ customers and community of 5000+ OpsStars worldwide, empowering them with revenue operations excellence that translates into compelling buyer experiences and competitive advantage. See www.leandata.com.