# OPS STARS AWARDS

# AWARD-WINNING
## OPS STORIES

**2023**

# OpsStars Awards

Recognizing Operations professionals and their ground-breaking innovations to drive pipeline, protect revenue, and support their organization's strategic objectives in 2023.

Staying ahead in a challenging economic market requires forward-thinking problem solvers who build solutions with real business impact.

We asked Operations teams and revenue leaders to share how they put strategies and processes into action to conquer the challenges posed by 2023. The results we received left us truly astounded.

Our task was to distinguish those who had not only risen to the occasion but had also shone brighter than their peers.

The stories featured in this compilation showcase the experiences of the 2023 OpsStars Award Winners. We hope their accomplishments will inspire you to reach for greater success in your individual roles.

# Contents

An organization or team that has built and executed account-centric programs with proven success. Their work has become best practice in how the organization approaches their account-based go-to-market motion through strategy, process, implementation, and analytics.

## THE WINNER

# RELTIO

## The Challenge

In 2022, the Reltio Sales and Marketing teams were experiencing challenges in their sales pipeline that impacted revenue. The BDR and Marketing teams struggled to deliver high volumes of leads that could convert. Marketing spend and other lead-generation resources were largely ineffective, resulting in a Lead-to-Opportunity outcome converting at less than one percent. Enterprise deals were stalling in the Qualification phase with 52 percent of Opportunities failing due to a lack of response. With an average of one contact per Opportunity, there was no insight into buying groups. Subsequently, the Sales team could not see the interactions of an entire buying team.

Facing these challenges, the Reltio team determined that to increase pipeline velocity, volume, and conversion, it was necessary to transition to an Account-Based Experience (ABX) model. This transformation required an overhaul of existing processes and re-architecting their tech stack. In addition, the frontline sales and BDR teams would need enablement and training sessions to ensure a smooth transition and adoption.

## The Operational Approach

Implementing an ABX strategy required a shift in mindset and a collaborative approach. First, the Reltio enlisted the Implementing an ABX strategy required a shift in mindset and a collaborative approach. First, the Reltio enlisted the help of company leadership at all levels to communicate the importance of this new strategy to their future success. A Revenue Management Council was formed to ensure strong cross-functional support throughout the transition. Next, Reltio developed a key strategic plan across the entire GTM team, establishing shared, measurable goals.

A specific Sales and Marketing team consisting of Operations pros, Analytics employees, and BDRs was formed to create new funnel definitions and determine how to operationalize them. Adopting an agile approach, Reltio implemented a minimally viable ABX process, gathered feedback from frontline teams, and iterated until a fully-fledged process was established. To further support the new ABX strategy, the Reltio GTM team distributed regular internal communications, training, meetings, and other updates to keep all relevant employees informed.

## Operational Results

In less than 60 days from alignment to completion, Reltio's combined GTM teams implemented a rearchitected customer acquisition funnel across their tech stack which included Salesforce, Marketo, ZoomInfo, Zapier, and Tableau. This included the development and implementation of new business processes, systems logic, and a KPI suite.

Under this new customer acquisition strategy, Reltio transitioned from a lead-based model to an opportunity-centric model. As a result, the number of contacts per new pipeline opportunity increased from one to three. Reltio's Account Executives and BDRs now have greater visibility into Accounts, being able to see marketing touch points, BDR outreach, Sales outreach, as well as the prospect's position in the funnel. Armed with this new intelligence, Sales team members have more targeted account planning and outreach.

Measurable outcomes include:

- 37% year-over-year increase in new actionable sales opportunities

- Reduced time in Qualification pipeline stage by 30+ days

"Despite Forrester predictions that this kind of complex transformation would take a year or more, we completed our transformation from an MQL-centric model to ABX in only two months. And, as a result, we are seeing a more effective, multi-threaded sales approach, higher volume, and quality pipeline."

Marianna Peyzner, Director of ABX and Demand, Reltio

# 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

**NVIDIA**

## The Challenge

With engagement in the hundreds of millions across many products and services, the NVIDIA Enterprise Revenue Marketing team deals with massive amounts of data. Integrating and consolidating that data from various internal systems and departments was proving to be a complex and time-consuming process. Adding to that complexity was the need to ensure data was high quality and accurate in order to make informed decisions.

As a large enterprise organization in its 30th year, achieving cross-organizational alignment at NVIDIA was challenging. Each business unit maintained its own data silos scattered across multiple systems. Stakeholders were not accustomed to sharing data and collaborating around a unified, actionable view of the data.

To achieve the ultimate goal of generating reliable insights to drive decision making, NVIDIA Enterprise Revenue Marketing needed to break down silos, foster cross-collaboration, and create a more cohesive approach to data governance.

## The Operational Approach

To address these challenges, the NVIDIA Enterprise Revenue Marketing team launched a "Revenue Analytics AI Suite," a comprehensive set of homegrown AI and software products that leverage existing NVIDIA data sources.

This suite unifies, processes, and translates data into actionable intelligence, enabling strategic decision-making. It combines third-party data with NVIDIA's extensive first-party data, thus enhancing its value. One of the standout features in the Revenue Analytics AI Suite is the "Propensity to Buy" tool. It deciphers diverse intent signals within a vast amount of data, providing a normalized predictive view in NVIDIA's complex organization. This AI-based tool accurately predicts NVIDIA hardware and software use-cases and workloads within their Salesforce CRM. By combining CRM, marketing, developer, and external data, the Propensity to Buy tool drives precise targeting within NVIDIA's marketing and sales strategies. It has allowed NVIDIA to holistically measure account interest based on data from all business data sources.

## Operational Results

Injecting third-party intent data into NVIDIA's AI models has stitched together an ocean's worth of data, allowing for the accurate identification of Accounts more likely to purchase. These changes have also created greater prioritization and a more targeted, better aligned, Sales and Marketing strategy. This digital transformation has also opened the NVIDIA Enterprise Revenue Marketing team's stakeholders' eyes to what is most important to the hand raisers in particular Accounts at any given moment.

Other positive outcomes include:

- Conversion rates up to 59% higher than traditional campaign targeting methods

- Significant decrease in the workload of campaign managers who gather target account lists

- Ability to identify high value accounts much faster

- Ability to drive more relevant conversations with prospective customers

- Better understanding of the lifetime value of accounts

"Traditional methods like mental processing and Excel spreadsheets fall short when it comes to handling the massive amount of data needed for prescriptive analytics in analyzing Enterprise Account relationships. AI provides the solution, eliminating the legacy obstacles of high infrastructure costs. The key lies in effectively applying AI technology."

Ari Capogeannis, Sr. Director, Enterprise Revenue Marketing, NVIDIA

## 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 agility lead distribution and response.

## THE WINNER

**AUTODESK**

### The Challenge

Historically, the demand generation team charged with marketing Autodesk's construction products focused on running marketing plays that drove a high volume of leads. As a result, business development representatives (BDR) received more leads than they could reasonably work in a single day. The marketing operations (MOP) team recognized that they needed a new approach in order to scale.

Autodesk's global reach and the intricate product portfolio added another layer of complexity. The MOP team supports five BDR teams globally across three geographic regions. Lead follow up is accomplished in 10 different languages. The product portfolio includes more than a dozen offerings that span the complex construction industry lifecycle. Autodesk needed to create a personalized buying experience with enough complexity and automation to support an ever-growing sales and marketing team.

### The Operational Approach

Change began with alignment between all teams and a commitment to improving their lead management processes. First, lead scoring was implemented so that only high-quality leads were handed off to the BDR team. Next, Autodesk used LeanData to implement complex routing rules, lead-to-account matching, and enforce service level agreements (SLAs) to ensure the right leads were delivered to the right people at the right

time. If leads are not worked within a specified time, they are reassigned to another team member. Managers use weighting and capping rules for performance management.

The final step in Autodesk's new lead management process involved routing leads into a specific Outreach sequence, populated with content targeted for a particular customer profile.

### Operational Results

As a result of Autodesk new lead management program, the marketing and sales teams are equally invested in ensuring that leads are high quality, enriched reliably, and worked to completion. With changes in place, Autodesk was able to reduce the size of the BDR team while still maintaining consistent conversion rates.

The newly created automation frees the BDRs from manual tasks, allowing them more time for revenue-generating activities. BDRs are now equipped with scoring signals, dynamic content, and coaching notes prior to making a call. They also have increased visibility into the prospect's campaign engagement. Important metrics and tracking are now available in Salesforce and Looker reports and dashboards. BDRs know the leads they should work and managers have the metrics to hold them accountable.

Other positive outcomes include:

- Lead-to-Stage One Opportunity conversion rate increased from 2% to 10%

- Worked leads increased from 60% to 99%

- Leads are now worked within one business day of receipt

"Optimizing for speed-to-lead is key in any organization that is dealing with heavy competition in their market. Every person who did not receive proper follow up is a potential success story for our competitors. It was imperative for us to connect with our leads as quickly as possible. Implementing and enforcing SLAs set expectations and delivered results."

Robyn Courtney, Sr. Marketing Operations Manager, Autodesk

# 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

**Rocket® software**

### The Challenge

Rocket Software was experiencing a variety of challenges in their lead management processes. With limited insight into the performance of lead sources, it was difficult to determine which were most effective in driving conversions. There was also a lack of visibility into the sales funnel, making it tough to track a lead through various sales stages.

While Rocket Software preferred to work with the Contact object in Salesforce, records were categorized as leads, which limited visibility into the entire account. Working with Contacts also required more time and research. Since Contact roles were not leveraged effectively, this prevented Rocket Software from creating Opportunities within Salesforce and ultimately resulted in an incomplete view of the customer journey.

### The Operational Approach

Rocket Software's approach to solving these challenges involved a comprehensive, iterative strategy aimed at enhancing lead qualification, optimizing marketing and sales processes, and improving their understanding of the buyer journey.

Rocket Software first developed distinct scoring models for each business unit. This helped to better identify high-potential prospects. Next, by restructuring Marketo, Rocket Software could monitor and analyze a potential buyer's progress at each stage of the funnel. Prospects were segmented within the

funnel, allowing for personalization in marketing and sales strategies. To re-engage with Closed-Lost leads, Rocket Software implemented lead recycling procedures to maximize re-engagement opportunities.

Last, to streamline the handoff process between Marketing and Sales, Rocket Software introduced functionality that alerted Sales Representatives of incoming qualified leads and implemented service level agreements. This improved overall lead management.

### Operational Results

By making significant improvements to their lead management processes, Rocket Software has experienced remarkable results. With their new scoring models, they can identify and engage with high-potential prospects faster, resulting in accelerated sales cycles and improved conversion rates. This data-driven approach has directly translated into more closed deals and increased revenue. Rocket Software now has the visibility they need to understand what strategies are working and how best to engage with buyers.

Other measurable results include:

- Increased lead velocity for MQLs by 75%

- Increased visibility into the funnel journey

- Streamlined lead management processes

"By adopting LeanData in our routing, we were able to streamline lead routing processes, ensuring that leads were efficiently and accurately routed to the right teams or representatives. This improved lead assignment and distribution, reducing response times and enhancing the overall customer experience."

Alex Wolff, Senior Manager, Marketing Technology & Operations, Rocket Software

# Most Cutting-Edge Ops Program of the Year

With the market in a state of constant change, revenue teams must stay on the cutting edge of innovation to stay nimble in new market realities. This award recognizes a team or organization demonstrating forward thinking solutions across people, process and/or technology resulting in real business impact.

## THE WINNER

# nexthink

## The Challenge

With Nexthink's Marketing Team shifting their focus from functional administrators to revenue drivers, they noticed that legacy KPIs like MQLs, Net New Leads, and First Meetings, were not effective measures of success. At the same time, there were inefficiencies in their go-to-market (GTM) processes. The Sales team had poor visibility into prospect engagement, open opportunities lacked insight into buying units, and opportunities were stalling in the pipeline. Nexthink needed to take a more collaborative approach between Marketing and Sales to nurture prospects through the sales funnel and measure activity with appropriate metrics. Plus, any changes required buy-in and support from the right internal stakeholders.

## The Operational Approach

To transition away from legacy marketing KPIs, Nexthink developed an in-house attribution model which included the implementation of DealTale, an attribution tool. Then Nexthink implemented a cross-organizational series of Monthly Business Reviews (MBRs) focusing on data-driven discussions on conversion rates, closed pipeline, and next steps for stagnant deals.

To track deal health, the Marketing Team took ownership of

Outreach, Nexthink's sales engagement tool, making hierarchy and territory management changes, defining optimal content pathways, and creating an enablement plan.

To improve visibility into buying units and engage them earlier in the pipeline, Nexthink developed a dashboard to measure buying unit maturity, employing a new metric, Total Annual Contract Value (AVC) Risked per Contact. This metric motivated sales reps to increase average contacts per opportunity, thus lowering risk.

## Operational Results

Nexthink's Marketing Operations team reflects the next generation of marketing ops who focus on impact to pipeline. As a result of their improvements to technology and processes, AEs and BDRs are more effective, with tool adoption increasing by 56 percent. These changes have increased visibility into buying units, with more contacts now added to opportunities and better insights into the buyer journey.

Other positive outcomes include:

- 2,500 prospects contacted using 26 AE-driven content sequences in Outreach

- $7.4 million in ACV influenced in six months, 80% of which accelerated pipeline

- Average number of contacts per opportunity increased from 2.5 to 4.2 (72%)

- 27% increase in registrations to Nexthink's annual conference

- Total ACV Risked per Contact decreased by 35%

- 76% increase in marketers using new business intelligence reports

"These lessons learned created a huge paradigm shift for our team and has changed the way we view our priorities and those that will impact Nexthink as a whole. Our CMSO challenged us to prove value and outline the direct impact of our priorities. This motivated us to think outside the box. It changed our perspective from thinking 'best practice is best,' to asking, 'What is best strategically for the business'?"

Rachael Williams, Senior Go-to-Market Operations Manager, Nexthink

# Winning Sales Cadence

This award recognizes an individual, team or organization who has optimized their sales cadences through a best-practice approach to improve efficiency, consistency, and performance, achieving outcomes such as increased pipeline, conversion rate, and revenue.

## THE WINNER

# NIQ

## The Challenge

With a new, state-of-the art platform, new predictive analytics solutions, and more channel coverage than ever, NielsenIQ (NIQ) sellers have more opportunities than ever to bring clients the Full View of consumer behavior. To keep up with rapid change, it's critical that NIQ teams quickly assess the complexity of each sales cycle and respond with urgency and customer focus.

The pace of change and innovation at NIQ over the past 18 months has been astounding. They're rolling out a number of new products and upgrades to their core measurement solutions, all of which are directly influenced by the voice of their customers. Speed to market is key when everyone is trying to gain a data-driven edge. Helping sellers deliver that edge to their customers requires tremendous agility and discipline.

## The Operational Approach

NIQ is using multiple sales engagement tools to create a tech-centric approach to bringing the Full View of the market—and their extensive portfolio-- to their clients. Their systematic approach to selling, enabled by technology, ensures everyone in the sales cycle, from lead generation through to deal closure, is intimately familiar with their customers' evolving needs and working diligently to solve them.

## Operational Results

For NIQ power users, particularly when combined with Salesloft, this tech and data-driven approach has helped them to perform up to 20% better than their prior baseline. NIQ also saw that their focus on role-specific enablement netted great adoption metrics, growing their power user segment by 25% and showcasing more intimate customer knowledge throughout the sales cycle with a 36% increase in activities tracked with Salesloft.

"We believe that by putting valuable processes in place for our sales teams to control the controllables, we allow them to focus on the unique value they bring to every customer conversation. Reducing focus on that internal "to do" list is top of mind for everyone these days.  We are taking this approach to customer problem solving even further now, modeling it to the NIQ teams that are responsible for helping our customers maximize the value they receive from their investment with us."

Nicole Collida Davis, SVP, Global Revenue Operations, NielsenIQ

# OpsStar of the Year

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

## THE WINNER

**Rachel Godfrey**
Senior Marketing Operations Manager

**bambooHR®**

## The Challenge

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

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

## The Operational Approach

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

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

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

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

## Operational Results

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

Other measurable outcomes include:

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

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

Rachel Godfrey, Senior Marketing Operations Manager, BambooHR

# OPS STARS™ AWARDS

## Thank you for your interest in our 2023 OpsStars Awards Winners!

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

**About LeanData**

Today's growth leaders power their B2B selling with LeanData, the gold standard in modern revenue orchestration and an essential element of the modern revenue tech stack. The LeanData Revenue Orchestration Platform, powered by No-Code Automation, simplifies and accelerates coordination of all the people, processes and plays needed to transform buyer signals into buying decisions. LeanData is inspiring a global movement among its 1,000+ customers and community of 5,000+ OpsStars worldwide, empowering them with revenue operations excellence that translates into compelling buyer experiences and competitive advantage.