# OPS STARS AWARDS

# AWARD-WINNING
## OPS STORIES

## 2024

# OpsStars Awards

Celebrating the exceptional achievements of Operations professionals who are pioneering innovative strategies to drive pipeline growth, protect revenue, and align their organization's strategic objectives in 2024.

In today's fast-evolving business landscape, staying ahead requires agile, forward-thinking problem solvers who implement solutions with measurable impact.

This year, we asked Operations teams and leaders to showcase how they've navigated the challenges of 2024, adapting processes and strategies to fuel efficient growth. The submissions we received were nothing short of remarkable.

Our challenge was to identify those who not only met the demands of the current market but set new standards of excellence, leading the way for their peers.

The stories in this compilation highlight the outstanding achievements of the 2024 OpsStars Award Winners. We hope their groundbreaking contributions will inspire you to drive even greater success in your own roles and organizations.

# Contents

# Account-Based Program of the Year

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

## THE WINNER

**workiva**

### The Challenge

As a global company with 2,000+ employees, Workiva's internal operations rely on many moving parts working in alignment. Last year, the Workiva team uncovered two challenges impeding the success of its ABM program. It was clear they needed to make changes to improve GTM efficiency.

The first challenge: operationally scaling ABM workflows with automation. Workiva's Marketing team wanted a way to automatically add high-value account targets to ABM campaigns based on buying triggers.

The second challenge: Workiva's Sales and Marketing teams discovered they were stuck in an unproductive feedback loop. Marketing would say the Sales team was not working target Accounts, and Sales would reply that the Accounts were not qualified enough.

Both challenges signified a need for a comprehensive re-evaluation of Workiva's Account segmentation and ABM structure and process.

### The Operational Approach

To solve these challenges, Workiva kicked off what they called "Operation ABM GTM." Implementing an ABM overhaul meant building strong cross-functional relationships among stakeholders. Workiva brought together key stakeholders from across multiple teams and discovered a critical need to evaluate their Account segmentation and tech stack.

The group first conducted a deep analysis of Accounts for more effective segmentation. Then, they audited Workiva's tech stack to understand all of the functionalities at their disposal. This helped them explore the best methodologies for integrating key Accounts into campaigns with automation.

Ultimately, they discovered that a new 6sense integration with LeanData, along with LeanData's updated Account routing functionality, enabled Workiva to associate Accounts with Salesforce campaigns after a key buying trigger event.

Once Workiva identified its best segments, Marketing initiated segmentation through 6sense and Salesforce campaigns to meet Sales where they work best.

### Operational Results

Workiva's refreshed operational workflow enabled the Marketing team to stay agile and boost alignment with Sales. This reduced account noise, streamlined handoffs, and enabled a more productive GTM feedback loop. Overall, Operation ABM GTM was a success. Workiva's ABM process improvements have saved the team time and resulted in efficient pipeline generation.

Moving forward, Workiva's GTM team plans on continuing to learn from this project and discovering ways to further improve account-based efforts.

Measurable outcomes include:

- $41 million in year-to-date pipeline generated.
- 68% decrease in target account noise with augmented segmentation.
- 50% decrease in time-to-insight for greater scalability.

"By shifting our focus to a more account-based marketing approach, we are getting closer to the ultimate goal of developing, warming up, and passing over Buying Groups to the Sales team. This case serves as a model for organizations seeking to enhance their marketing and sales alignment, lean into their techstack, and drive long-term growth through ABX."

Taylor Conlon, Director of Global Marketing Data & Analytics, Workiva

# 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

Even well-established companies like Juniper Networks, a multinational networking software company generating over $5 billion in revenue, continually seek opportunities for growth and optimization in their GTM strategies.

Recent organizational changes have sparked a renewed focus on enhancing transparency and collaboration among the Marketing, Inside Sales, and Field Sales teams. Sales teams have been highly effective in focusing on Accounts and Contacts, while Marketing's efforts on Leads and campaigns have driven impactful campaigns. However, this success highlighted opportunities for even greater alignment and synergy across teams.

The decentralized information structure revealed a clear path for increased collaboration. Field Sales and Inside Sales were enthusiastic about accessing more relevant information to better serve their Accounts and streamline communication. With valuable enterprise account insights spread across multiple data repositories, the Marketing and Sales teams saw exciting potential for enhanced alignment through improved processes.

Juniper Networks is poised to focus more effectively on the right Accounts and most promising Opportunities. The team is motivated to establish a new, unified operational framework that will drive success across their GTM organization

### The Operational Approach

Juniper Networks had a lofty to-do list to make a meaningful transformation. The GTM teams needed to establish a seamless and timely connection between Leads, Contacts, and Opportunities. Correct lead routing relied on integrating Marketing pipeline with Sales, and automating the process was a must for scalability. Plus, the team had to safeguard metadata from getting corrupted by manual processes.

To start, business and operational leaders agreed to streamline the Sales and Marketing funnel and transition to a unified ABM approach. The GTM team adapted Salesforce and LeanData routing to merge into a cohesive account engagement point aligned with ABM objectives. Contacts were configured to include Marketing funnel stages that reflected engagement similar to Leads and incorporated all necessary fields to facilitate LeanData routing. They also configured all third-party databases to integrate directly with Salesforce so they could ditch the manual multi-step process of uploading contact lists.

Next, Juniper Networks introduced extensive automation to its workflows. Intelligent contact routing would now deliver Leads and Contacts to the right SDR, trigger an Outreach sequence, and ensure continued engagement with prospects and Accounts at scale. And, finally, the Marketing team templatized its campaign creation structure and created a setup wizard to reduce the need for significant operational support.

To support all of these changes, GTM operations, Sales leadership, and IT aligned on key outcomes, timelines, and enablement. After implementation, Marketing Operations led several global boot camps to get everyone on board and they continue to enable representatives through live and pre-recorded training sessions.

### Operational Results

Juniper Network's team effort paid off! Their GTM has streamlined lead and contact integration, lead conversion, and marketing campaign creation and management. Today, LeanData automation is responsible for 96% of all lead-to-contact conversions and 84% of any record type lead conversion to contact, effectively eliminating the need for manual touches.

Other significant outcomes include:

- 40% match improvement overall, enabling 10% more LeanData-converted Contacts associated with meetings.
- The global SDR team saved an average of 35.5 hours per month on manual effort.
- Marketing campaign creation time was reduced from multiple days to just a few minutes.

"Previously, conversion required manual effort from reps, taking anywhere from five minutes to several hours, depending on volumes and data quality. Scaling the new process necessitated automation."

Stephanie White, Senior Manager Marketing Operations, Juniper Networks

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 of lead distribution and response.

## THE WINNER

**teikametrics**

### The Challenge

As a platform designed for connecting leading brands with buyers, Teikametrics knows the value of optimizing for revenue. When the team noticed inconsistencies with its lead management, it was time for a change.

Teikametrics faced significant challenges in qualifying Leads, scheduling demos, and managing the sales handoff process. Manual, error-prone workflows led to delays, inefficiencies, and misrouted Leads, causing friction between marketing and sales. Operationally, they struggled with data inconsistencies between HubSpot and Salesforce, leading to over 4,000 sync errors that disrupted workflows. Inefficient scheduling processes, fragmented lead source tracking, and inadequate event follow-up further hampered their ability to convert Leads to Opportunities. The overall lack of automation and system integration resulted in lost Opportunities and undermined their marketing efforts.

### The Operational Approach

When it became clear that these challenges weren't sustainable, team members from RevOps, Sales, and Marketing joined forces to create a cross-functional project, known as the "Foundation Initiative." This cross-functional team created an action plan to address their GTM issues and gain leadership buy-in for the proposed solutions. Ultimately, the Foundation Initiative aimed to align Sales, Marketing, and RevOps to create a unified strategy that would tackle inefficiencies at each stage of the funnel.

To restore order, the Foundation Initiative identified four primary root problems: 1) database mismanagement, 2) form fields and qualification status misalignment, 3) mistrust regarding Lead quality, and 4) unclear lifecycle stages.

To address database inaccuracies, the team focused on eliminating duplicate records, standardizing fields, enriching data, and fixing over 4,000 sync issues between Hubspot and Salesforce. Consolidating 800+ forms into a single universal form simplified field mapping to ensure campaign alignment across Hubspot and Salesforce.

Database issues contributed to a lack of trust between Sales and Marketing. They addressed this by introducing a lead scoring model to align GTM outcomes. Finally, the team implemented LeanData BookIt to automate meeting booking with the right rep. They also leveraged BookIt at events, ensuring a next meeting before the prospect even left the booth.

This comprehensive approach by the Teikametrics team was designed to solve immediate problems and create a sustainable framework for future growth and success.

### Operational Results

The work of the Foundation Initiative was a great success! They improved data quality by clearing out 1,100 outdated lists in Hubspot, over 39,000 outdated or invalid Contacts across HubSpot and Salesforce, and 11,000 duplicate accounts. Creating a universal lead capture form streamlined previously complex lead capture and enabled a reliable automated booking process.

Other positive outcomes include:

- 17% increase in conversions from event Leads.

- +133% year-over-year increase in MQL-to-Opportunity conversion efficiency.

- Automated meeting bookings, freeing up a dedicated resource to monitor.

"Within our cross-functional team, we have decades of experience in tech companies and startups. While the outcomes speak for themselves, the collaboration across teams led to greater buy-in from leadership and allowed us to dedicate the necessary time and resources to this project."

Scott Filip, Senior Manager of Go-To-Market Strategic Operations, Teikametrics

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 of lead distribution and response.

## THE WINNER

### The Challenge

BMC Software, a global IT company, was dealing with complex business logic around lead management. With various product pillars and a global team spread across multiple regions and countries with different local working hours and holidays, it was particularly difficult to track SLA compliance.

The lead management process was being run by one person, and while it was decided to shift the responsibilities cross-functionally so teams could have more input, they realized their current setup would be a challenge. There was no visual representation, so it was difficult to manage and troubleshoot. Sales wanted to make changes throughout the year, leadership wanted better tracking and the analytics team had issues with reporting. There were more exceptions than rules and no one could explain what was happening.

As with many GTM teams, there was very little communication or collaboration between Marketing and Sales. This led to mismatched expectations and competing priorities. Marketing had its own set of goals, metrics, and operational execution; Sales had another. BMC Software leadership challenged its GTM team to reinvent lead management.

### The Operational Approach

When a problem gets too complicated, sometimes you have to start over. That's exactly what the BMC Software team decided to do. Building from the ground up, they migrated from Distribution Engine to LeanData to get more flexibility with lead routing and key metrics tracking. Education and training for the entire lead management team was also a top priority, including getting LeanData Certified.

They updated their legacy lead scoring model to speed up lead scoring time and re-defined the MQL model to only consider those who took a 'hand raising' action. Alongside the traditional model, they were able to add several AI scoring models to their lead management processes thanks to the flexibility of LeanData.

A big change for BMC Software was the addition of notifications and alerts through Teams. Alerts meant they could catch errors and unrouteable leads faster than ever. BDRs now receive alerts about high-value leads and SLA notifications to proactively stay on track.

They also piloted Buying Groups, associating new leads with existing open Opportunities. The Opportunity owner and others are notified via Teams to review and qualify the new Buying Group member and assign the correct Opportunity role.

### Operational Results

Big changes bring big results. The Buying Groups pilot program matched 203 leads to early-stage opportunities and received a great response from the Sales team. One member expressed their gratitude because they received three director-level or above contacts related to a recently-assigned opportunity.

One year after implementing these changes, BMC Software is saving time and money thanks to consolidating its matching and routing programs.

Other positive outcomes include:

- 97% accuracy from routing thousands of leads.

- Decreased SLA for MQLs from 24 hours to 8 hours.

- Average lead response time of 150 minutes .

"Above all we reframed our perspective to shift from 'how can we meet the business metrics,' to instead focus on 'how can we provide the best experience for our customers and prospects.' This led us to focus on speed to lead, providing the fastest follow up possible and giving the team all the data they need up front."

Mike Letendre, Senior Marketing Programs Manager, BMC 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

**mongoDB**®

### The Challenge

In a constantly changing market, revenue teams have to adapt. This is how MongoDB found itself at a turning point last year. Its GTM needed a change to boost the efficiency and effectiveness of its Sales Operations.

Information silos, manual processes, lack of real-time insights, and scalability were the most pressing concerns for MongoDB's GTM teams. These challenges hindered their ability to provide timely and accurate information across the revenue team. Some common challenges were delayed decision-making, inconsistent messaging to clients, and reduced productivity.

MongoDB's programs revealed gaps in sales enablement and training resources. Employees, particularly new hires, found it challenging to quickly learn about complex products and strategies without a centralized knowledge base. The overwhelming volume of information across different platforms created information overload. Plus, limited collaboration led to missed opportunities for cross-functional learning and innovation.

### The Operational Approach

MongoDB got creative. They launched a comprehensive approach centered on developing and implementing "coachGTM," an AI-powered knowledge assistant using MongoDB Vector Search.

A centralized knowledge hub consolidated scattered information and provided a single source of truth for all GTM-related information. By fostering a culture of knowledge sharing, MongoDB also enabled employees to contribute information and provide feedback to the knowledge base.

For example, coachGTM automated repetitive tasks, such as answering frequently asked questions and providing personalized onboarding resources. This freed up valuable time to focus on strategic initiatives. Integrating coachGTM with existing tools also meant information was easily available within the team's daily workflows. Finally, MongoDB's changes established a feedback loop to ensure continuous improvement. This ensured that coachGTM's algorithms and knowledge base aligned with the organization's evolving needs.

### Operational Results

CoachGTM has had a positive impact across the organization in areas of employee satisfaction, customer engagement, and data-driven decision-making.

Employees are more confident and less stressed, directly addressing key concerns raised in employee engagement surveys. The team is more efficient thanks to individualized enablement and on-demand support that caters to their needs. Customers receive enhanced experiences, leading to faster onboarding, easier expansion, and improved overall customer satisfaction.

Measurable outcomes include:

- $2 million in annualized costs savings based on an average of 60,000 questions answered per year, with each question saving roughly 30 minutes of CSM/Sales time.

- $3 million in projected annualized savings in FY25 as more team members adopt coachGTM.

- Total ACV Risked per Contact decreased by 35%.

- 76% increase in marketers using new business intelligence reports.

"CoachGTM's ability to learn and adapt over time makes it a scalable solution that can grow with the organization, ensuring continued effectiveness as the knowledge base expands and user needs evolve."

Sai K Ramakuru, Director, Sales Productivity, Strategy and Analytics, MongoDB

Recognizes a marketing team that has fostered exceptional collaboration and alignment between marketing and other GTM departments like sales and operations. This award highlights the team's ability to break down silos and work seamlessly with other teams to achieve shared goals.

## THE WINNER

# sumo logic

### The Challenge

Sumo Logic is a best-in-class cloud-native company that helps make the digital world faster, reliable, and more secure. Last year, the Sumo Logic team identified several critical challenges to their GTM efficiency. With speed and reliability at the heart of the organization, the team recognized the need to improve GTM collaboration.

One of the most critical challenges Sumo Logic faced was departmental misalignment. Teams operated in isolation, leading to miscommunication and inefficiency across departments. This was further complicated because different departments used separate tools and platforms that didn't speak to each other.

The lack of structured collaboration between departments turned into missed opportunities and duplicative efforts. On top of this, brand presence took a hit. Fragmented communication and disjointed efforts resulted in inconsistent messaging across Marketing and Sales channels. The Sumo Logic Marketing Operations team knew it was time to take action.

### The Operational Approach

Sumo Logic adopted several key strategies to improve collaboration and efficiency across its teams. Embracing agile methodologies for campaign planning and execution, such as sprint cycles and iterative planning, meant the team could quickly adapt to changes and market dynamics. This flexibility allowed Marketing to launch campaigns faster and more precisely and stay aligned across departments.

They brought together Marketing, Sales, and Operations to establish cross-functional teams. This new structure promoted continuous communication and collaboration to align departments with strategic objectives. They began running regular stand-up meetings and planning sessions to foster a culture of transparency. To address issues of inconsistent messaging, the task team developed a unified messaging framework with input from all departments.

Sumo Logic needed to eliminate data silos and improve visibility, so they unified their technology stack by linking the CRM, marketing automation, and analytics platforms. This created a single source of truth for the entire revenue team that tracked leads seamlessly from acquisition through conversion. With these changes, Sumo Logic could make more well-informed, timely decisions.

### Operational Results

While tracking ROI is still in progress, the teams report they are now able to see the work, prioritize, and quickly pivot to market changes.

"We established cross-functional teams that included members from Marketing, Sales, and Operations. This structure facilitated continuous communication and collaboration, ensuring everyone was aligned with our strategic objectives. Regular stand-up meetings and collaborative planning sessions became the norm, fostering a culture of transparency and teamwork."

Gina Morris, Senior Manager Marketing Operations, Sumo Logic

# 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

### Kelly Goles
Manager, Revenue Marketing Operations

**NVIDIA.**

## The Challenge

NVIDIA has a large and complex account management process that has traditionally been through internal sellers and an ecosystem of channel partners. When Kelly joined NVIDIA six years ago to work in marketing operations, NVIDIA was taking steps to build a traditional lead management model and a more direct customer motion. The first SDR hire was made and lead management was taking more of a forethought.

From roles in marketing ops, sales operations, and revenue marketing ops at NVIDIA Kelly built out the MarTech stack, processes, and eventually a team that would cover lead management, enablement, automation, campaign management, and integrating processes across operations functions.

Developing a tech stack presented its own set of challenges in three main areas: **triggering, orchestration, and action.** Triggering relied on gathering sufficient customer data to build an accurate scoring and intent model. Orchestration required correctly routing leads to the appropriate rep based on attributes and next steps. Actioning had to align with the customer journey to appropriate paths in sales, marketing, customer success, developer relations, or co-selling with partners.

To add to the challenges, change management was historically difficult and would require a top-down directive and a bottoms-up adoption strategy.

## The Operational Approach

**Triggering**: NVIDIA uses Salesforce as the core customer database for its operating model, where specific individuals are flagged to "trigger" actions based on complex inputs. Triggers are determined by a Customer Data Platform that compiles customer profiles based on interactions with NVIDIA's marketing, developer programs, partners, sales, and third-party data from vendors like People.ai and 6Sense. A "Propensity to Buy" AI model developed by data scientists on the Revenue Marketing team analyzes this data to determine buying intent scores at both account and individual levels, which then guide demand generation and ABX campaigns.

**Orchestration**: Once flagged, LeanData routes Leads to the appropriate sales, customer success, developer, or other customer-facing teams for follow-up action. This process ensures the individual isn't already engaged by another team. "We're moving towards looking at orchestration as connecting via queuing to engagement tools that tees up or automatically executes tasks for sellers in a tool vs a notification like we've done in the past," says Kelly.

**Action**: Flagged Leads and Contacts are put into inbound and outbound campaigns in SFDC that correlate actions the seller, marketing, developer relations, customer success, and partners could take. Soon, Gen AI emails and content recommendations will help create these sales campaigns based on the customer journey detected from previous touchpoints in the CDP.

## Operational Results

Thanks to a built-out Operations team, updated tech stack, and cross-functional alignment, Kelly and her team streamlined lead management and simplified departmental reporting around traditional KPIs like conversion rates, pipeline, churn, and revenue.

NVIDIA saw major increases in its database and sourced revenue because of these changes. Automation saves Operations and Sales time hours each week on Salesforce administrative tasks and boosts lead outreach per sales representative.

Positive measurable impact includes:

- 1,500 hours per week of sales users' time saved.
- 4x the amount of Leads that representatives can work.
- $9.1 million worth of Contact additions to the CRM.
- $1+ million in sourced pipeline compared to the previous year, and influenced over $60 million.

"I think it's important to cross-functionally coordinate the effort not just with a demand generation or ABM focus but in the context of customer success, developer programs (if applicable), and other customer-facing functions that are working with the same user base."

Kelly Goles, Manager, Revenue Marketing Operations, NVIDIA

# OPS STARS™ AWARDS

## Thank you for your interest in our 2024 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.