



# A SaaS Startup SkYROCKETS Win Rate by 38% with a Fully-Automated Marketing & Sales Funnel

Industry: **Technology, Information & Internet**

Project: **Marketing Automation**





# A B2B SaaS Startup With Revenue Leakages and Long Lead Launch Times

The client was previously using Salesforce and Marketo CRM but struggled with a systematic disconnect between marketing and sales touch points, thereby leading to revenue leakages.

Marketing campaigns took a long lead time to launch, and manual lead assignment process resulted in data duplication, uneven distribution of work among sales reps, and a lag between lead to opportunity cycle, ultimately affecting the bottom line.

## Introducing Territory Management Features & Strategic Integrations in Marketo & Salesforce

- Quick handoff between sales and marketing teams
- Automated lead routing mechanism increased:
  - **Pipeline Efficiency by 36%**
  - **Sales Win Rate by 38%**
- **Improved marketing campaign efficiency** by data protection with privacy policy compliance audits.
- Granular report generation drastically enhanced the **performance visibility** of both functions.
- Optimal concentration of resources drove **higher individual and team performance.**

*Let's check out the blueprints for bridging the gap between sales and marketing.*



# A Custom Solution to Streamline Data Flow between Marketo and Salesforce

Xgrid introduced territory management features and strategic integrations in Marketo to streamline campaign and ad mapping for channel-based engagement. The following tools were implemented:



Our solution drastically **improved the lead handoff** between sales and marketing, ensuring timely lead-to-opportunity cycles. It empowered the marketing teams to create and **build customized campaigns** without IT support.

Salesforce's automated lead routing mechanism helped accurately map data to the **sales pipeline**, reducing coordination and follow-up time between the two functions, thereby channeling more energy into **closing deals**.

## Marketing and Salesforce Best Practices

### Marketing Solution Features

- Custom **gated** and **ungated marketing assets** for **lead enrichment**.
- **Web form handlers** in Marketo to auto-capture leads via web form.
- Marketo integrations for **LinkedIn, Salesforce, GoTo, and TechTarget-enabled campaign** and **ad mapping** for channel-based lead enrichment.
- Concepts and designs for **webinars** and **lead enrichment** with pre-webinar and post-webinar actions.
- Developed **form-guided landing pages** for **lead nurture**.
- Use of 3rd party tools for identifying duplicate records and merging them. Territory management using **dependent picklist values** further improved the assignment process. **Lead routing automation** helped to route leads with unparalleled speed and accuracy.
- Maintained **lead scoring** and **platform integration** via email marketing and event planning (webinars) on ZoomInfo for enrichment.

## Sales Solution Features

- Kept **records up-to-date** across revenue funnels.
- **Automated** the workflows in Salesforce for lead assignments.
- Introduced **matching and duplicate rules** in Salesforce for identifying duplicate data and merging it. This data was further processed and enriched with the integration of third-party tools (such as ZoomInfo).
- Implemented **lead scoring** and **cross-channel platform integration** for lead enrichment in Marketo.

## Did You Know?

For our client, creating marketing campaigns took longer than the average industry benchmarks in Marketo. Our team engineered **customizable program templates** for quick plug-and-play, **reducing the campaign** launch time with minor modifications and **improving reach and marketing KPIs**. Setting up the right campaign analytics metrics helped in monitoring and **optimizing campaign performance**. The automated lead assignment technique implemented by our team helped quicken the lead handoff process with **high data quality** and **resolved sales quota conflicts**.

## About Us

Established in 2012, Xgrid has a history of delivering a wide range of intelligent and secure cloud infrastructure, user interface and user experience solutions. Our strength lies in our team and its ability to deliver end-to-end solutions using cutting edge technologies.

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