



DIGITAL MARKETING

CASE STUDY



ACCTIVATE

THE CLIENT

ACCTIVATE

Acctivate Inventory Software helps distributors, manufacturers and online retailers manage their inventory better. Prospects often spend weeks to months researching, comparing, and demoing a variety of platforms that meets the growing needs of their business.

Vertical: B2B Software

Services: Marketing consultation and execution on numerous go-to-market strategies including product positioning, content direction, pay-per-click (PPC), lead nurturing, CRM and website conversion

Challenges:

- Sales & Marketing worked in silos
- High abandon rate for first-time site visitors
- No email automation to nurture leads

Accomplishments:

- Drove an additional \$61,000+ in revenue over 3 months
- Drove 19% YOY Growth
- Delivered 20+% more leads per month through PPC
- Doubled sales in one year for the food and beverage vertical



THE CHALLENGE

First time website visitors often were not ready to plunge into a demo or a free trial, and most would abandon without providing an email address.

Visitors ready to see a demo were being communicated to on a one-to-one basis and the lack of automated emails caused some opportunities to fall through the cracks.

Prior to Bay Leaf's engagement, Acctivate's Sales and Marketing teams operated in silos. The Sales Team relied on a homegrown CRM that was not tied to the email marketing platform. Marketing depended on their email system to send monthly newsletters, but lacked automation and segmentation.

Sales reps dealt with numerous "tire kickers" and for leads that appeared to be a fit, the number of back-and-forth calls and emails were starting to take a toll.



STICKING THE GLUE BETWEEN SALES & MARKETING

To achieve stronger alignment between Sales & Marketing, Bay Leaf rolled out a marketing automation and CRM tool (Hatchbuck) that allowed for emails to be properly segmented, scaled, and delivered with timely collateral based on the behavior of the prospects – all without disrupting sales operations.

Bay Leaf Digital worked closely with the Marketing team and helped triple their content marketing efforts. Marketing began emailing prospects on behalf of the Sales team with fresh, insightful content. Thanks to the lead nurturing efforts, shoppers continued to see Acctivate's brand be at the top of their inbox.

After six months, members of the Sales team were playing less phone tag and sending fewer manual emails. By freeing up the reps' time, they were able to shift their focus to more serious prospects.



Bay Leaf provided guidance to Marketing on how to nurture prospects based on where they were in their journey. This alleviated much of the sales team's burden of manually following up with prospects via email.

The new automation paved a path for the sales reps to focus on closing more deals. The team became efficient at managing the deals and outgrew Hatchback. Two years later, Bay Leaf Digital rolled out a more robust marketing automation tool (HubSpot), which allowed for stronger automation, better lead distribution, self-booking of appointments, and better reporting.

BREATHING NEW LIFE INTO COLD PROSPECTS

Bay Leaf recognized many older prospects had "fallen of the radar." Rather than ignore or delete these inactive leads, Bay Leaf Digital segmented any that have not responded to any emails or phone calls in at least six months.

In a joint effort with the Marketing team, Bay Leaf dripped out a combination of thought leadership guides, case studies, videos and monthly promotions which turned these dormant leads into a 24% increase of renewed opportunities, leading to over \$61,000 in incremental revenue in three months.

"Our guys used to be able to juggle 25-35 active opportunities each in a month. After Bay Leaf helped us roll out marketing automation tied to a CRM, we can now keep up with 40-60 a month. This has allowed us to close more deals in the same amount of time."

- Dakota May, Sales Manager at Acctivate





GETTING QUALIFIED OPPORTUNITIES ON THE PHONE FASTER

In the spirit of persuading more serious visitors to walk through a live demo, Bay Leaf launched a popup where visitors could schedule a day & time with the Sales rep by phone.

In the first three months of launching the self-booking appointment popup, the Sales team received over 40 highly qualified leads who were ready to talk to a sales representative and reduced the time it took to connect with the prospect by over 50%.

LOCKING IN ON SPECIFIC INDUSTRIES

Bay Leaf analyzed which top industries were the most likely to turn into a sale

Reduced time to connect with prospects by



and worked with Marketing to personalize emails by vertical. The industry-segmented email campaigns boasted the highest open rates and double the CTR when compared to generic marketing emails.

By aligning industry specific messaging to prospects, the Activate Sales team doubled their sales within one of its target industries when compared to the previous year.

