



Engaging Customers Throughout Their Lifecycle with Engagement Studio

Dan Komin

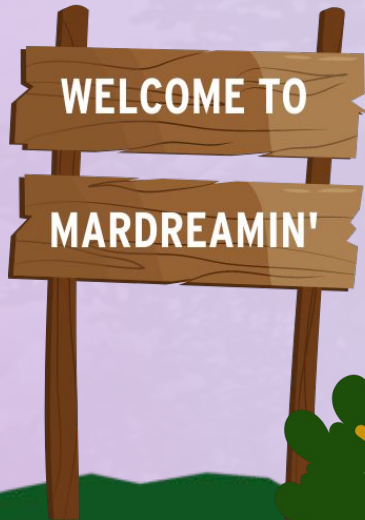
Laserfiche, Director of Demand Generation

Alexaya Learner

Laserfiche, Senior Manager of Marketing
Operations

Agenda

1. Automating Lead Nurturing in Engagement Studio
2. Automating Customer Onboarding
3. Automating Review Generation Campaigns

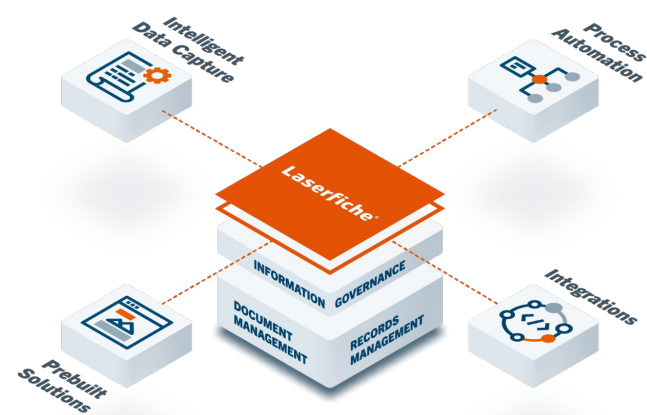




Automating Lead Nurturing in Engagement Studio

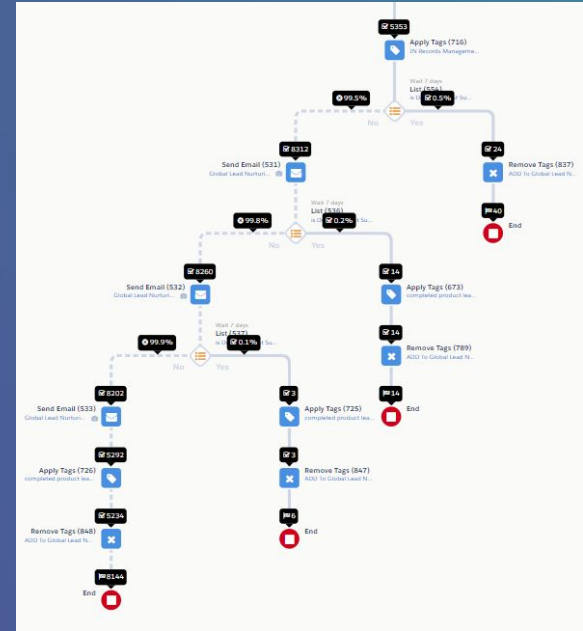
Challenges that Led Us to Nurturing

- We have a complicated product that can do a lot.
- Buyers aren't aware of the solutions we provide.
- Our product serves many different industries & use cases.

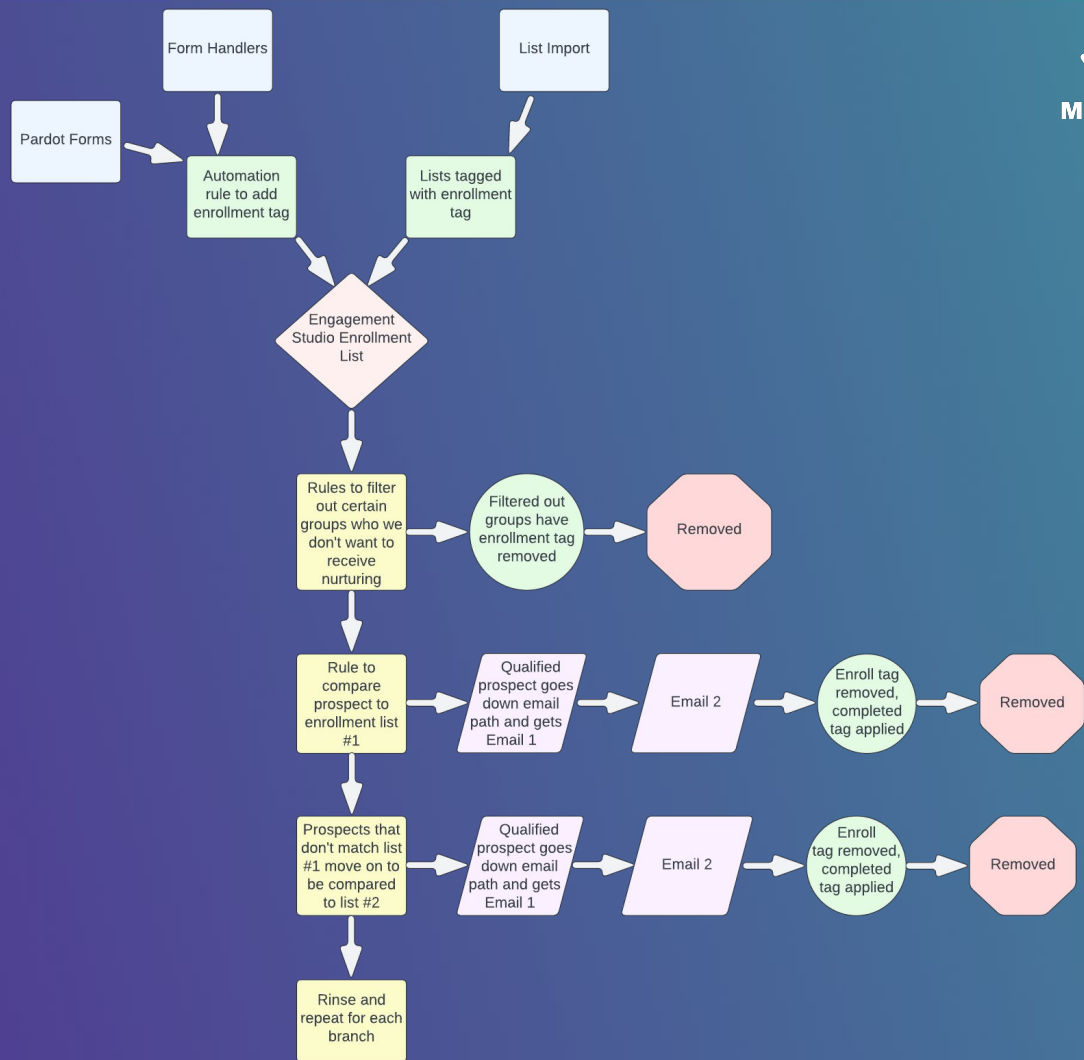


Where Nurturing Comes In

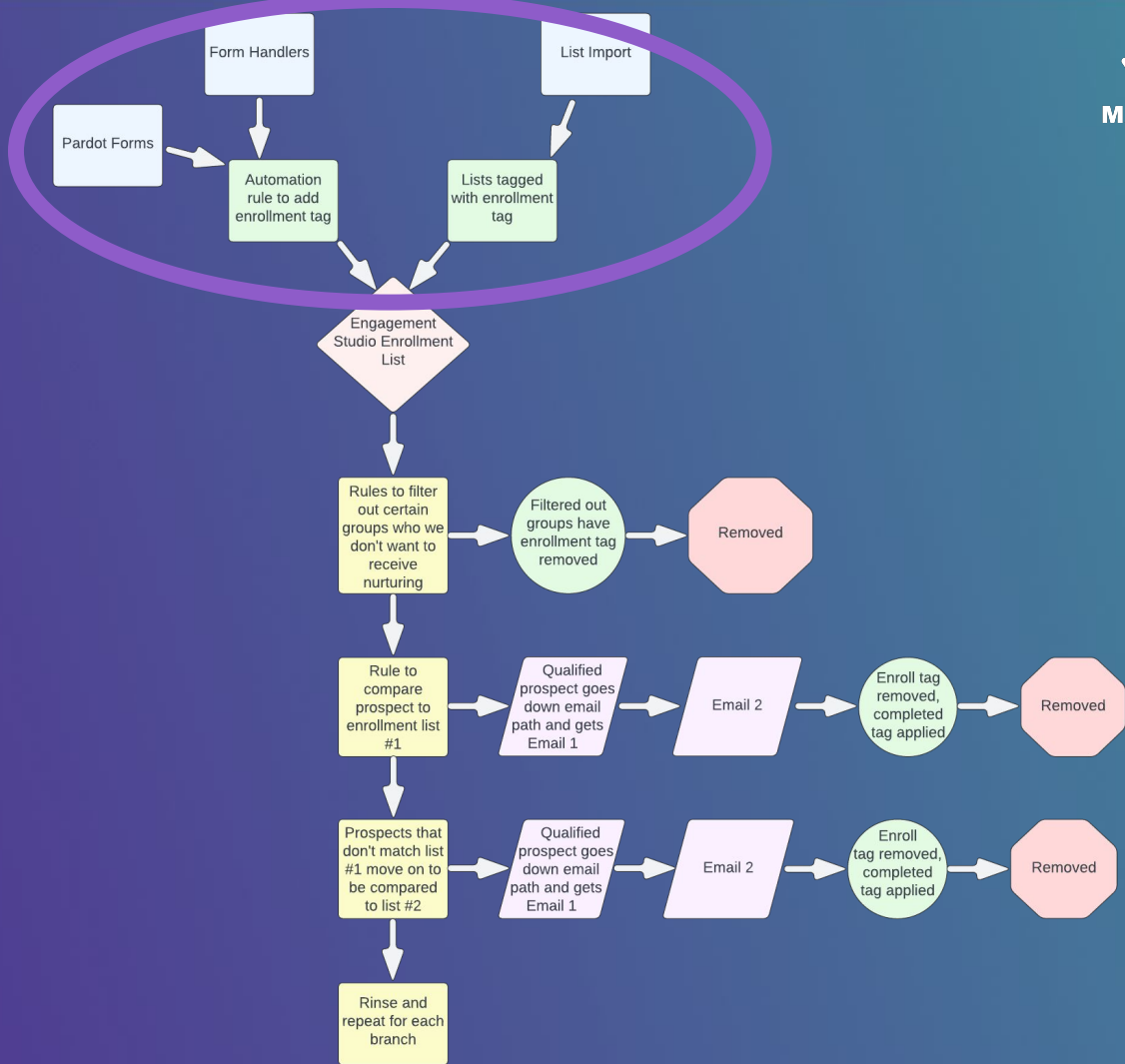
- Show buyers how our product solves problems across industries & use cases.
- Launched engagement studios with different product & industry “branches”.



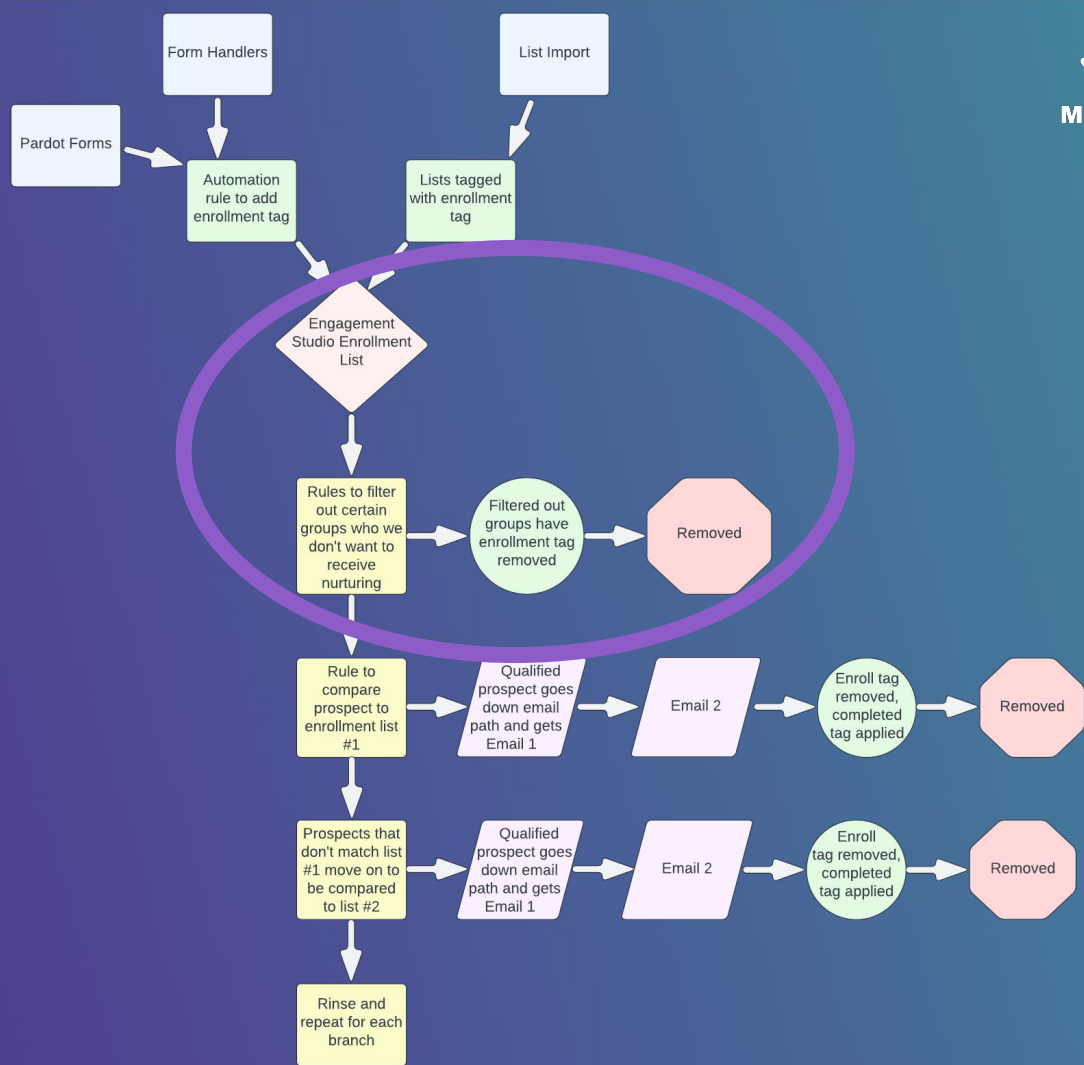
How It's Structured in Engagement Studio



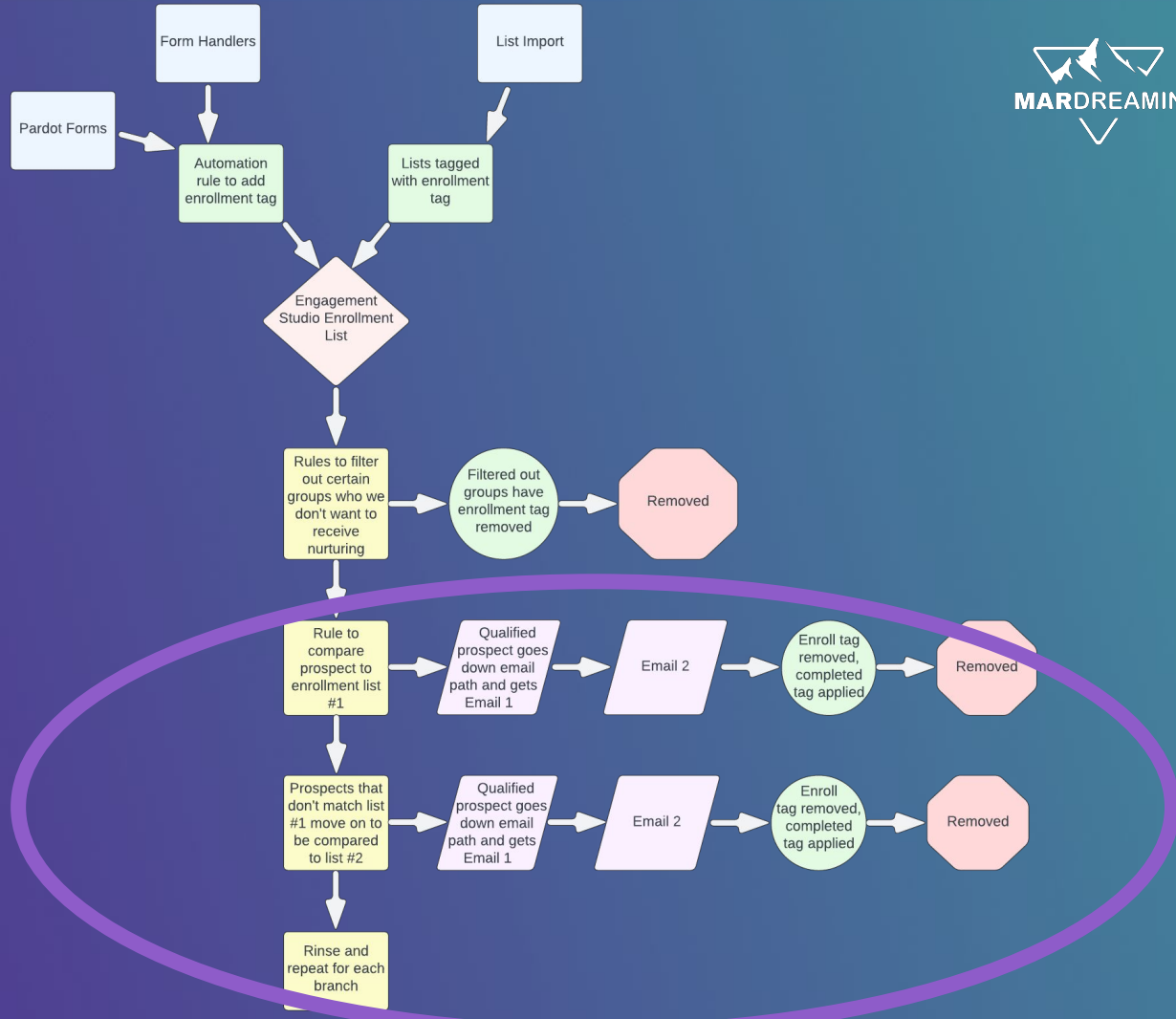
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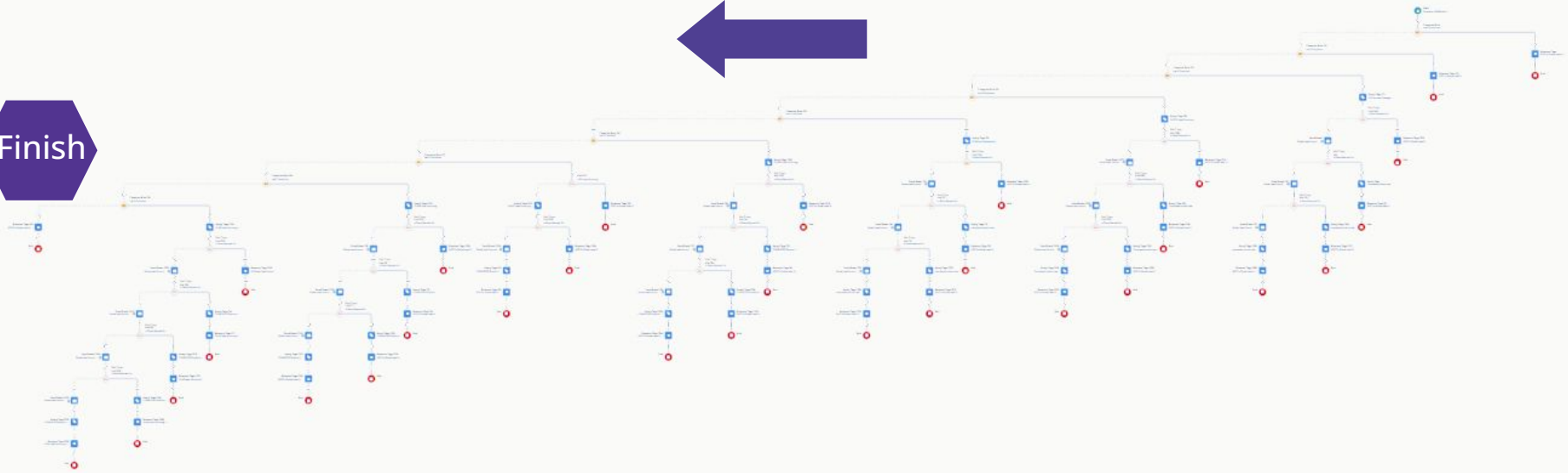
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The Real Engagement Studio

Start

Finish



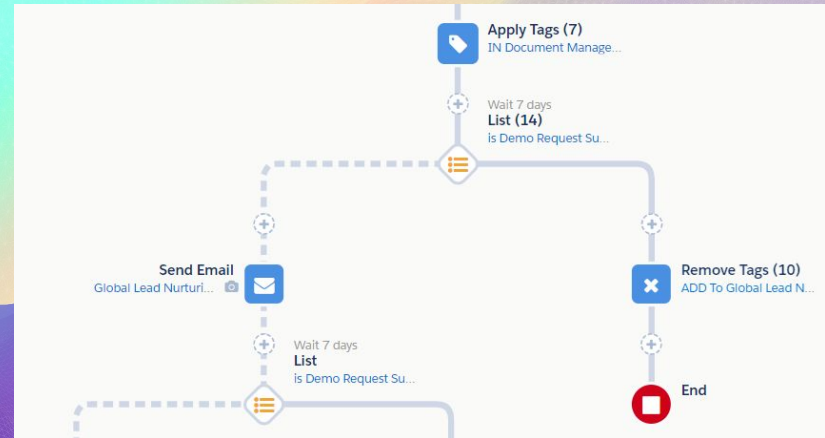
1. Kicking It Off & Filtering Out Customers

- Our Pardot instance holds several databases combined so filtering is necessary
- Failsafe backup to suppression lists
- Prospects enter the flow's dynamic list using tags, when they leave they need tags removed
- Complex rules are awesome!



3. Send the Emails & Listen for Demos

- Tags are added upon branch enrollment for easy list building, and upon exit if they've "completed" the branch
- Enrollment tag always needs to be removed upon exit!
- Our program currently listens for a demo request & removes if there is a request



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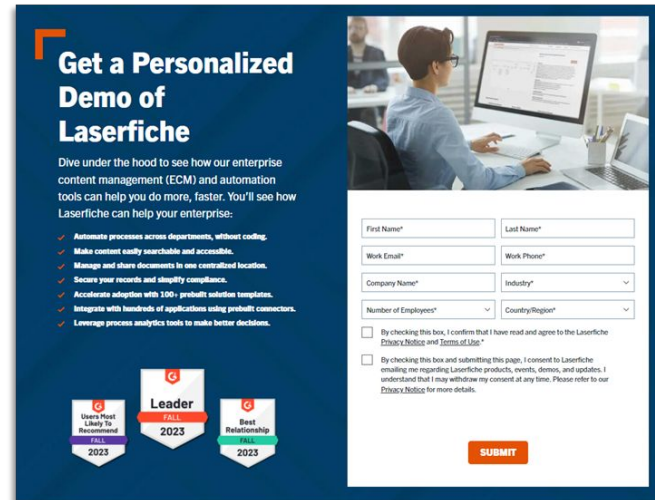
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KPIs: How We Judge Success

- Demo requests
- Unique click-through rate (CTR)
- Unsubscribe rate
- What KPIs do you use to judge success?



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SUBMIT

How We Optimize Nurturing

- Meet quarterly to review performance based on KPIs
- Review with copywriter, Pardot admin, email marketing manager
- Ensure you have statistical significance before you assess results



How We Optimize Nurturing (Cont.)

- Testing new subject lines (*if open rate is low*)
- Testing new body copy (*if click rate is low*)
- Swap in new emails in place of low-performing emails (*if open and click rate is low*)
- Add new nurturing branches based on market demand, trends



Our Email Marketing Benchmarks (B2B Tech)

- Unique open rate - 21.58%
- Click-through rate - 2.55%
- Delivery rate - 99.08%
- Unsubscribe rate - 0.17%



Automating Customer Onboarding

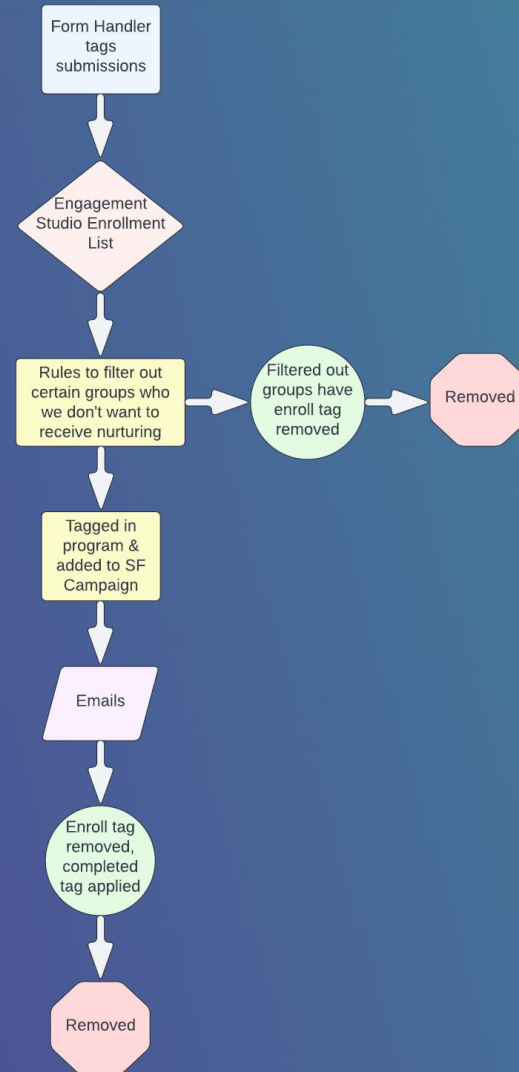


Why customer onboarding?

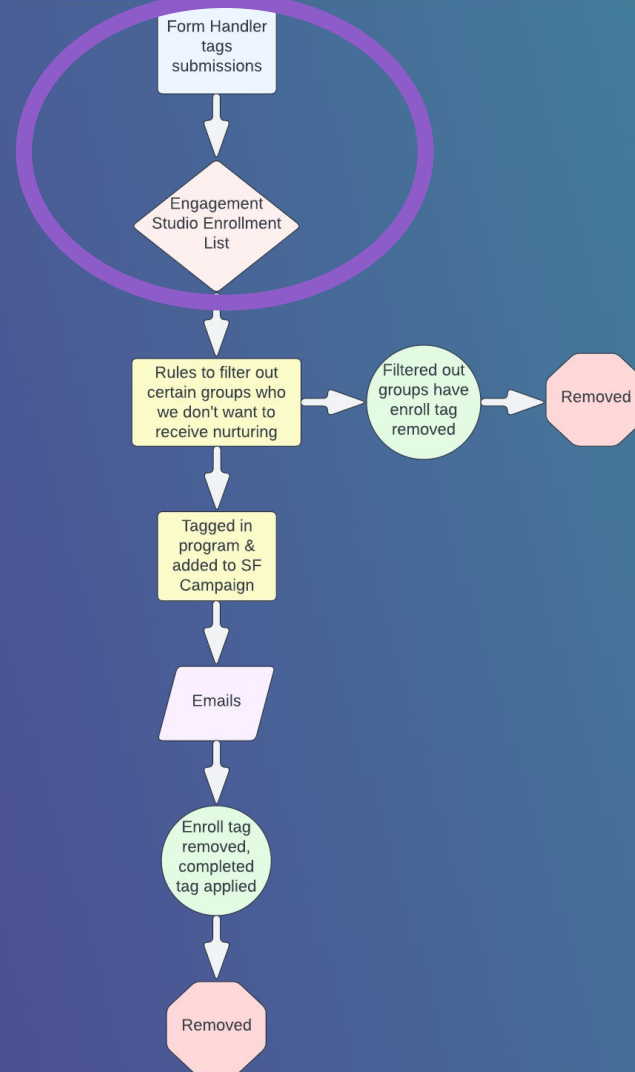
- Keep our SaaS product “sticky” with customers
- Educate customers on features
- Improve renewal rates
- Improve customer satisfaction



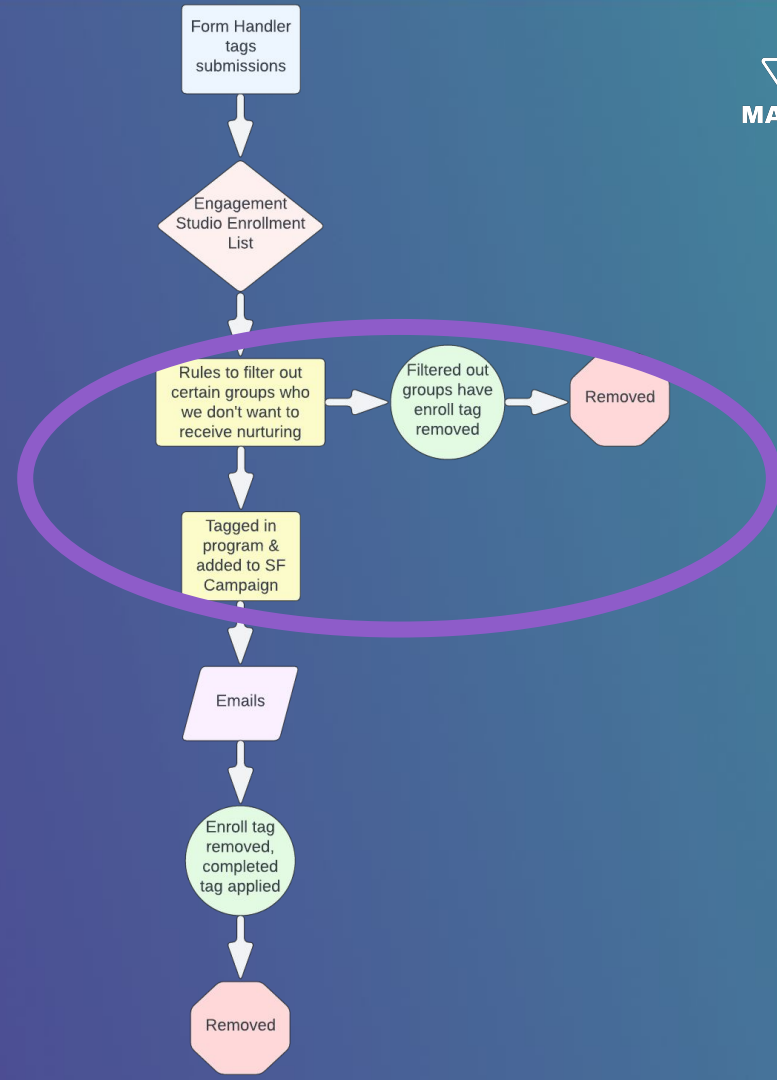
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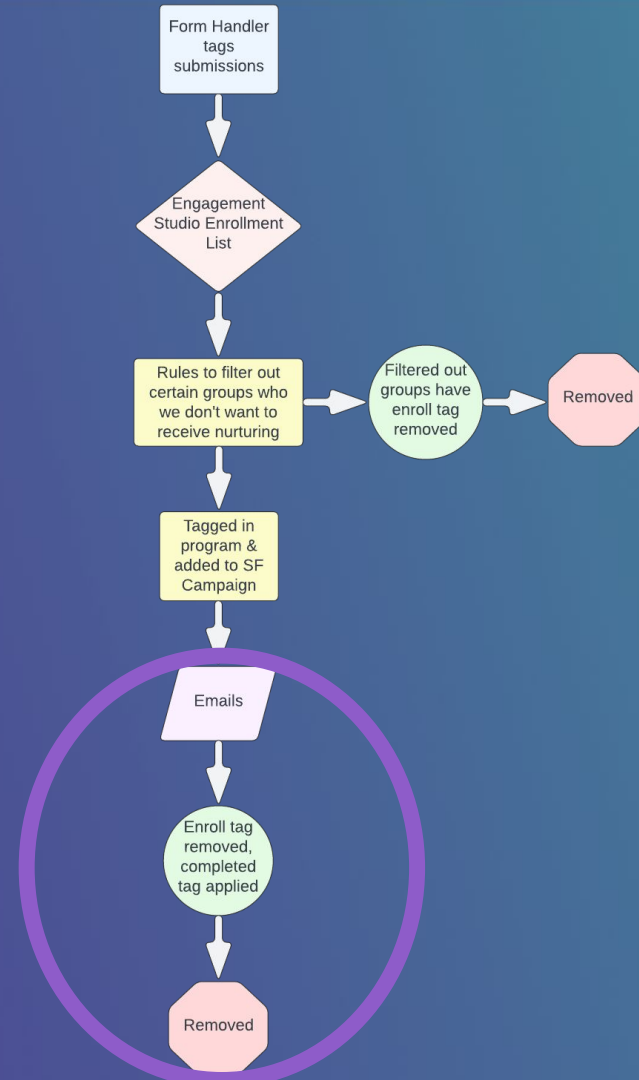
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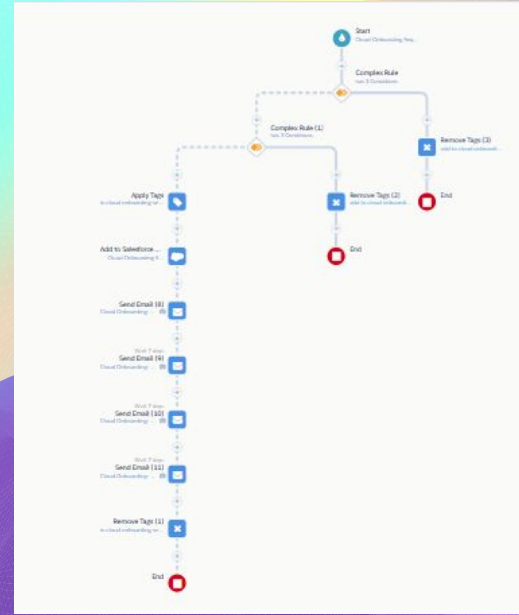


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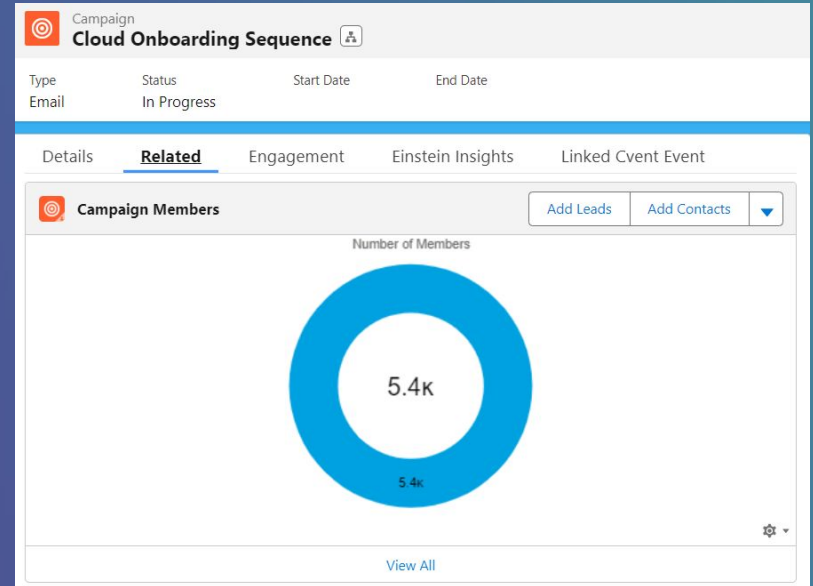
Customer Onboarding Flow

- Tags control entry (and need to be removed upon exit)
- Filters keep unwanted prospects out
- Salesforce Campaign allows data to be combined with renewals and expansions



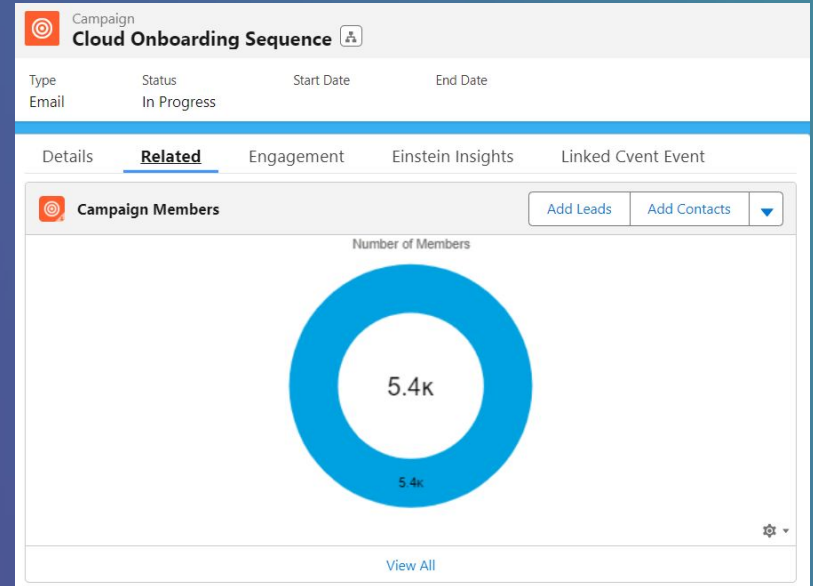
KPIs: How We Judge Success

- Add nurtured customers to a Salesforce campaign
- Report on longevity & ARR of customers who went through flow
- Compare to the control of customers who haven't gone through the flow
- Compare performance metrics to benchmarks for CTR, open rate, etc.



KPIs: How We Judge Success (cont.)

- Any audience members have a formula for customer lifetime value (CLTV)?





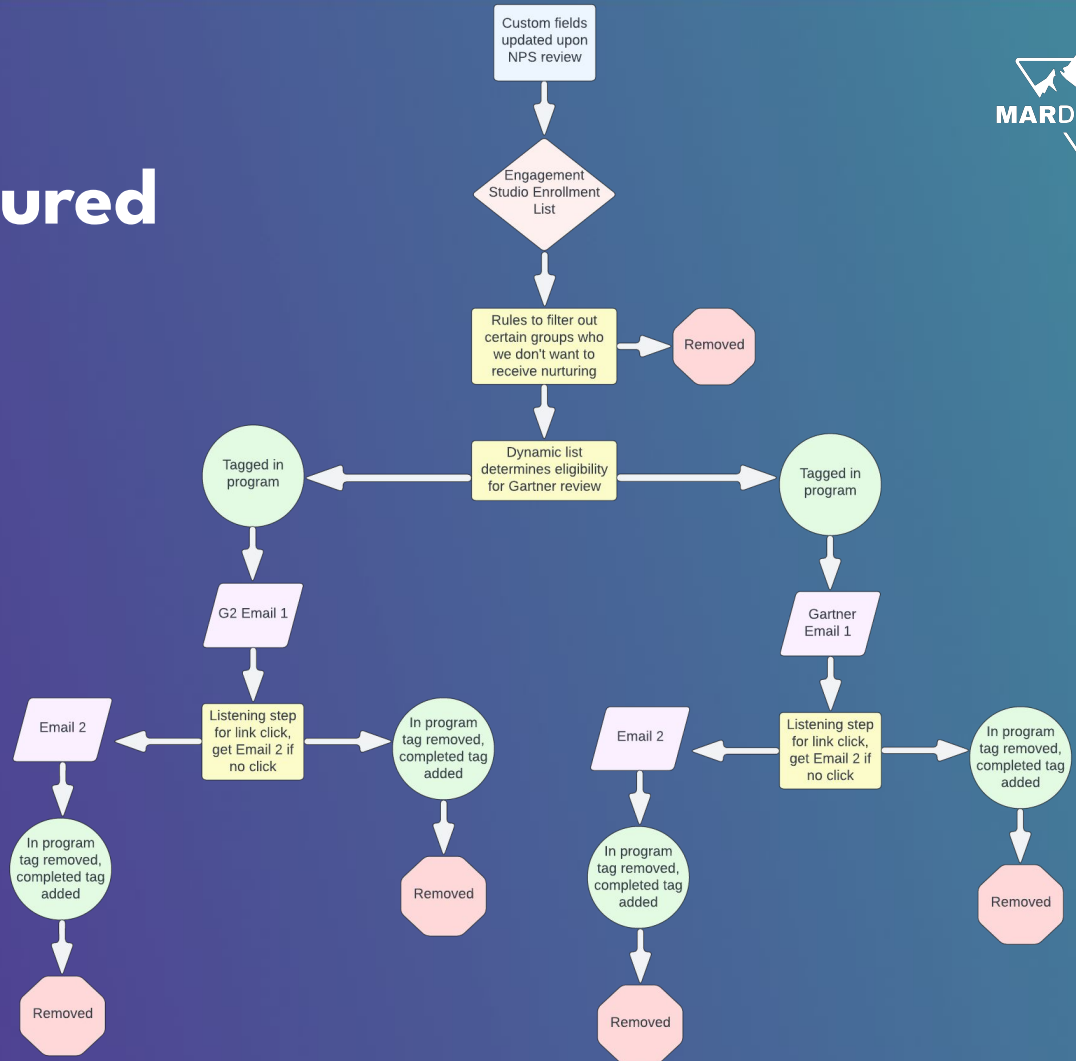
Automating Review Generation Campaigns

Why review campaigns?

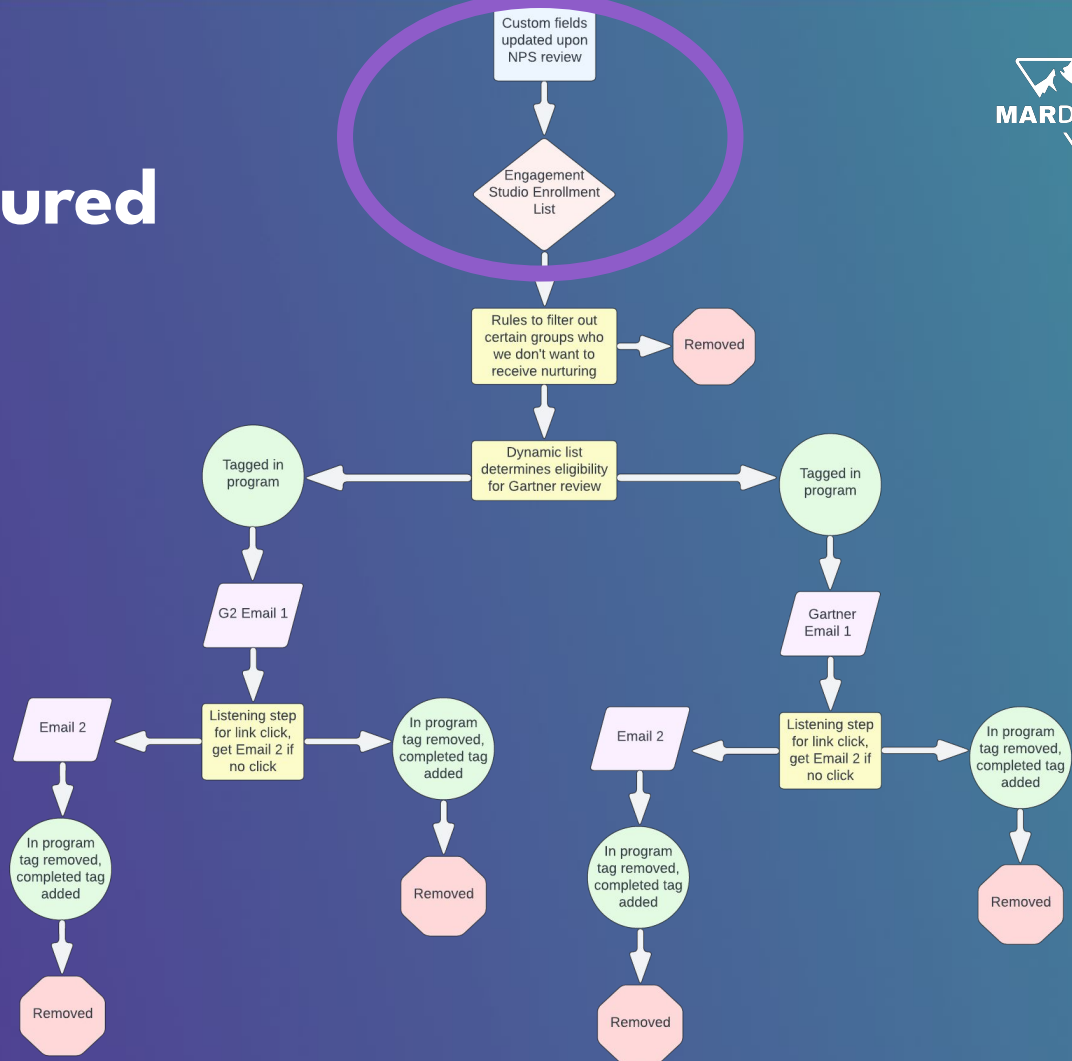
- Reviews are crucial to the B2B tech buying process
- Need quality reviews to win deals
- Need to target champion customers to improve conversion (we use NPS 9s and 10s)



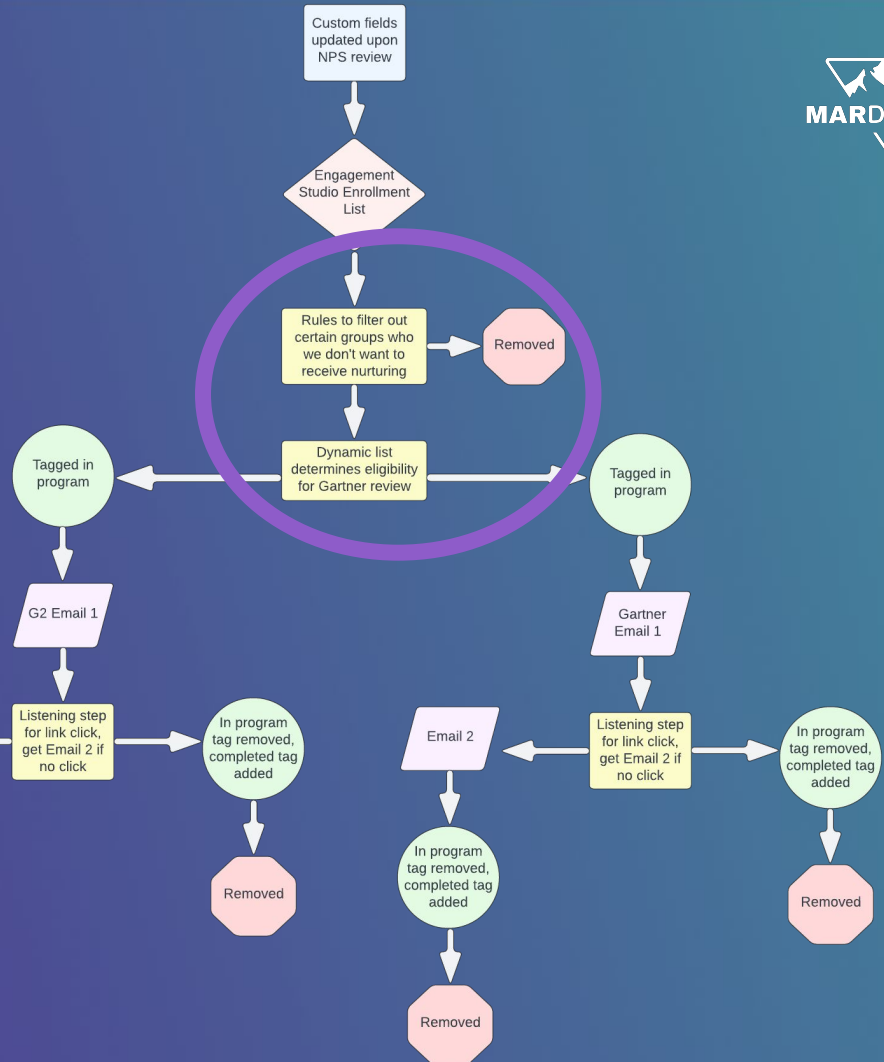
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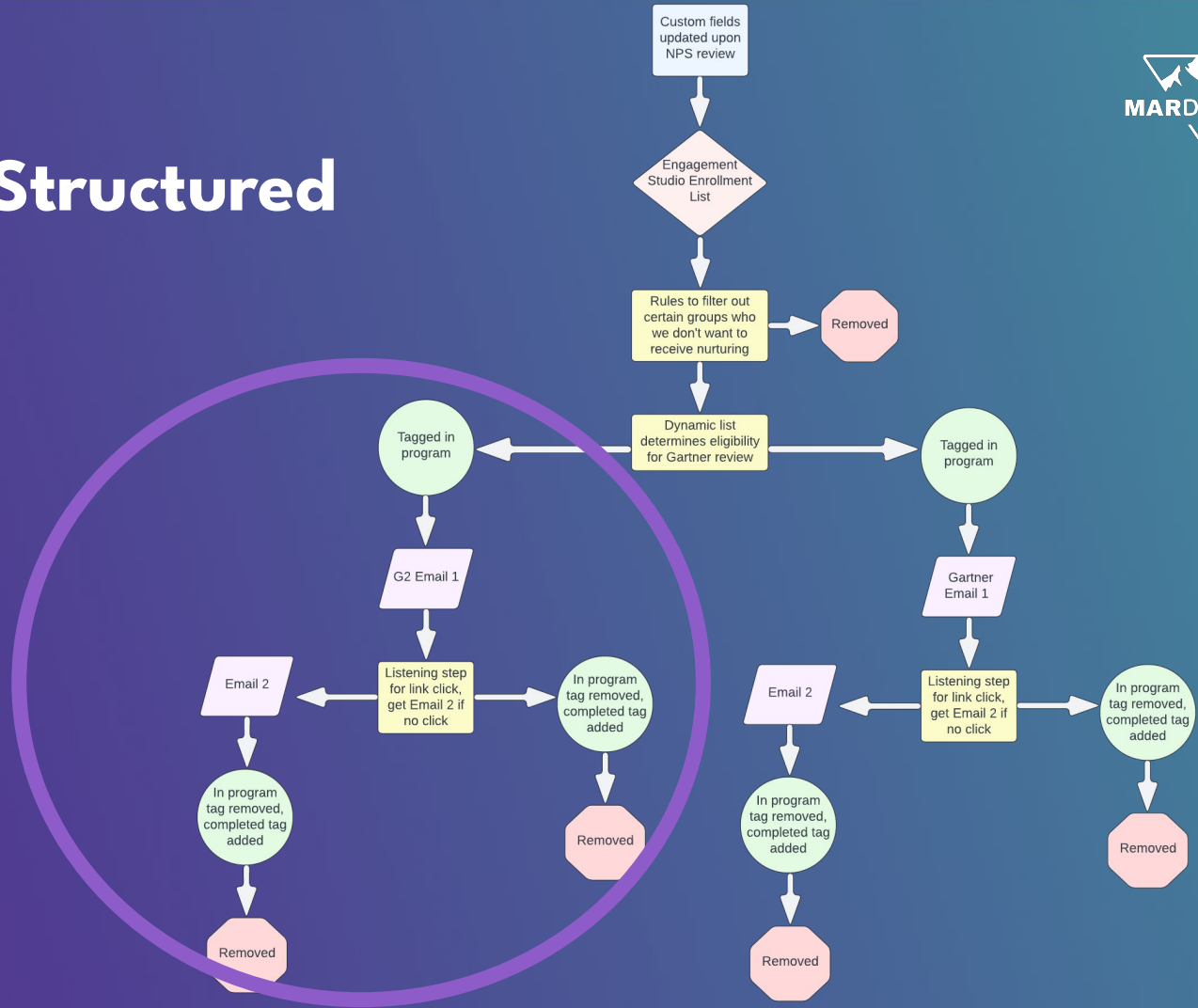
How It's Structured



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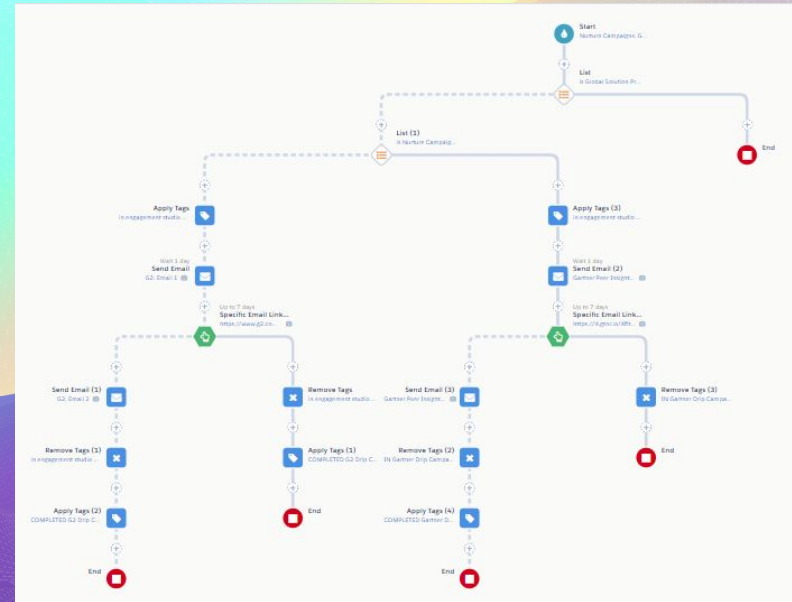


How It's Structured



G2 and Gartner Flow

- Tags are used for prospects currently in the flow and when they've completed it
- Listening for a click allows us to ensure customers don't feel spammed once they've taken an action



Question for Audience

- **What data point(s) do you use to identify your champion customers?**



KPIs: How We Judge Success

- Review quantity and quality
- Consistency and recency of reviews
- Average rating **increased from 4.5 to 4.7 stars** on both G2 and Gartner Peer Insights



How We Optimize Review Campaigns

- Review performance regularly to identify areas for improvement
- Tweak subject line (to improve open rate)
- Tweak body copy (to improve click rate)



Conclusions

1. Think about the whole journey from the customer's perspective – not yours.
2. Start with KPIs, business requirements & a diagram before you start building.
3. Don't set it and forget it – review regularly and make continuous optimizations.
4. Learn from both the wins and the losses.

Thank You!

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