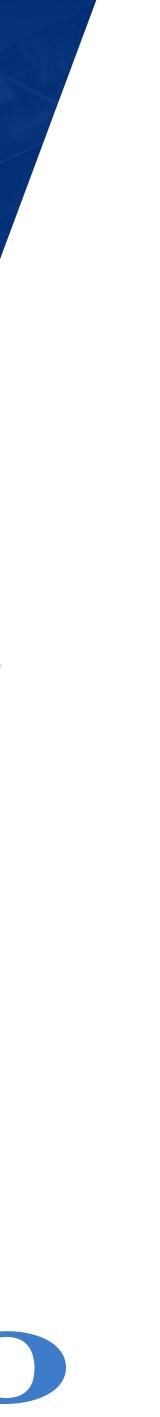# How Automation Anywhere
Built an Efficient Pipeline Generation Machine with BAO

Automation Anywhere, a robotic process automation (RPA) provider, needed to scale pipeline growth. This required bringing in a sophisticated partner who could convey the complexities of their value proposition—and deliver results.

"We were looking to build out a much more efficient pipeline generation machine. And that's why we partnered with BAO for appointment setting services."

David Morrison DIRECTOR OF GLOBAL LEAD GENERATION

BAO

A top-performing program

BAO has secured over 1,400 introductory meetings for more than 74 sales execs over the course of the four-year partnership. But the quality of the meetings set by BAO is what stands out the most to the Automation Anywhere team. BAO's ROI Tracker post-meeting survey tool tracks the quality of every meeting, providing quantitative data about the program.

The average ROI Tracker score for meetings set for Automation Anywhere in 2023 beat industry benchmarks. And 50% of BAO-set appointments are deemed to have potential to turn into an opportunity—which is 25% above the industry average—with 43% having a defined second sales activity. "The ROI Tracker enables us to track future pipeline, which is priceless. We're a highly metrics-driven company so our ability to measure performance is critical," said David Morrison, Director of Global Lead Generation.

The primary metric Automation Anywhere uses to measure all campaigns is cost to pipe. Not only is BAO one of the most efficient programs on this metric, it comes in 60% below the company's target.

"I wear a lot of hats. My job requires that I do a ton for my book of business and it's not all sales activities—traveling to customer sites, sending proposals, doing internal and customer sat activities. But BAO is there week in and week out, getting me meetings and that's a big part of what makes BAO so impactful."

James Nulis ENTERPRISE ACCOUNT EXECUTIVE AT AUTOMATION ANYWHERE

74 sales execs

1400 meetings secured

50% of BAO-set appointments are deemed to have potential to turn into an opportunity

"Hands down, BAO is one of the most efficient programs we run."

David Morrison DIRECTOR OF GLOBAL LEAD GENERATION

How BAO helped build the path to more efficient pipeline generation

I've been impressed with the BAO ISRs' ability to prospect on our behalf. Their incredibly detailed grasp of our messaging and how it benefits the prospect is really quite amazing and special.

David Morrison   DIRECTOR OF GLOBAL LEAD GENERATION

Comprehensive data for smart targeting

When the program started, the target personas included 12 different line-of-business (LoB) executives, from Supply Chain to Human Resources. The feedback from the ROI Tracker showed us that the meetings within a couple of LoBs were far more effective and more likely than the others to result in additional sales activities. With this data and our flexibility to pivot, we worked with Automation Anywhere to confidently streamline the LoB target list to the half-dozen that proved to deliver the best pipeline return.

"BAO has a unique skill set of being able to navigate through organizations to get to the right people on the phone. I've been very impressed with their level of knowledge about our target audience, and that makes a really big difference."

DAVID MORRISON, DIRECTOR OF GLOBAL LEAD GENERATION

Highly skilled ISRs who can communicate complex messages to different audiences

Like many leading B2B technology companies, Automation Anywhere's messaging is complex. AI and automation mean different things to different people, so clarity about what the solution is and isn't is critical. BAO ISRs are often the first to have a live conversation with prospects about the solution, so they need to communicate the message in a way that's both accurate and effective.

Appointment Setting for consistent at-bats to set sales up for success

Effective pipeline building requires face time with prospects on a reliably ongoing basis. BAO does this by providing scalability to support Automation Anywhere's needs as they evolve. At any given time, the program flexes to support from 11 to 40 sales reps, so the company always has the coverage it needs.

Best practices for program success

Morrisson shares his tried-and-true best practices
to get the most value from any BAO Appointment Selling program:

Will Kwan
VP CANADA AT AUTOMATION ANYWHERE

"It comes down to quality for us versus quantity. We've seen a big shift toward quality for our reps across the program, and that's what has impressed me most about BAO."

1 **Regularly review results down to the rep level.**
"If we see someone lagging behind, we'll dig in to figure out what's going on and how to turn it around."

2 **Collaborate with BAO to strategically refine targeting and messaging.**
"Don't provide account lists that are just wish lists of who reps want to get meetings with. Work together to apply more rigor around your ideal customer profile—that makes a big difference."

3 **Review all of the ROI Tracker feedback.**
"Use the detailed feedback to find the solid future leads and make sure you're on top of it when the prospect is ready to go."

4 **Ensure reps are highly engaged with their BAO ISRs.**
"The more you have ongoing conversations about who to go after and the talk track for those people and use cases, the more you're going to get out of the program."

5 **Use the program to reward desired behavior.**
"We had one good rep who was providing positive feedback and had a lot of activity, but wasn't adding it to Salesforce and we weren't seeing the pipe. When he realized his slot in the BAO program was in jeopardy, he quickly updated all the account records—he was Mr. Pipeline that week!"

6 **Leverage ROI Tracker feedback for sales coaching.**
"We've had situations where RVPs saw a particular use case mentioned for one company and were able to provide examples of where we did that with other customers to help reps improve performance."

Best practices for program success

Nulis offers the following advice to **help reps maximize the success of their ISR partnership**—and their own sales effectiveness:

1
Be prescriptive but flexible.
"Provide an airtight list of personas and target customers, but trust your ISR's judgment about non-obvious opportunities—these diamonds in the rough can be great opportunities."

2
Help ISRs expand their messaging arsenal.
"Provide case studies and other information, for example by vertical, as good examples of what to talk about in particular scenarios."

3
Understand that sales is not a linear process.
"Some opportunities with marquee prospects come in at a lower stage. You want to do the work to follow up with good next steps and nurture those relationships."

4
Do not underestimate the power of the telephone.
"Most people avoid calling, but BAO ISRs make a ton of dials every day. It's really effective and very inspiring—it's a great reminder that I can make just a couple of calls to more effectively drive to a meeting, address a question, or some other action item."

5
Provide honest feedback on the ROI Tracker.
"Provide genuine information about the meetings—both good and bad—because that's how you improve."

6
Communicate effectively.
"Regular standing meetings are good, but it's more important stay in touch via text and ad hoc calls to keep each other up to date."

How can BAO's Appointment Setting help make your sales team more effective and efficient?
Contact us to learn more

James Nulis
ENTERPRISE ACCOUNT EXECUTIVE AT AUTOMATION ANYWHERE

"I've been impressed with the quality that BAO delivers. Of course, there's the title of the person we're meeting with (I get a lot of VP meetings) and the company, but my ISR does a great job of setting expectations with the prospect I'm scheduled to meet with he spends time asking the right questions."