MARKETING WITH ACCOUNT INTELLIGENCE

PRIORITIZING BUYERS TO RAMP UP DEMAND GENERATION WITH HIGHLY TARGETED MARKETING

BAO OPPORTUNITY IDENTIFICATION FOR O.C. TANNER

O.C. Tanner set out to launch an aggressive lead generation initiative. To drive pipeline and revenue, the company turned to BAO for an Opportunity Identification (OppID™) program to better understand its target market and feed its sales organization with qualified leads. "Our reps have deep experience," said House." But our market has more than 22,000 prospective accounts. There were untapped opportunities out there, and we knew that some very targeted marketing programs could help our reps find them."

To identify opportunity, House and Nilsson needed to quickly gain a deeper understanding of how their target universe looked at an individual account level.

BAO and O.C. Tanner worked together to develop a custom OppID™ profile designed to capture the specific account-based insight needed to isolate O.C. Tanner's hottest prospects.

BAO contacted 500 organizations and interviewed executives to assess where there is real opportunity in the market and segmented the accounts based on their buying behaviors.

O.C. Tanner develops employee recognition strategies and rewards programs that help companies appreciate people who do great work.

KEY PLAYERS

TY NILSSON

Director of Demand Generation

O.C. Tanner

NATALIE HOUSE

Director of Customer Experience Marketing

O.C. Tanner

Opportunity Identification gave O.C. Tanner the ability to understand and uncover opportunities within its target market in order to:

Prioritize accounts

Create a focused go-to-market strategy

Create targeted marketing campaigns to feed the sales organization with qualified leads

Turning Account Intelligence into Targeted Marketing

With OppID™ insights in hand within a matter of weeks, O.C. Tanner developed an integrated direct-mail and digital marketing campaign complete with a targeted marketing mix aligned to each segment of its market.

> THE ACCOUNT-LEVEL INTELLIGENCE WE GOT FROM BAO **HELPED US TO GET VERY, VERY GRANULAR IN TARGETING OUR PROSPECTS**," SAID HOUSE. "WE WERE ABLE TO DETERMINE WHAT WOULD RESONATE ON AN INDIVIDUAL LEVEL AND WHAT WE'D NEED TO DO TO MOVE SPECIFIC PROSPECTS ALONG."

CUSTOM ACCOUNT INTELLIGENCE

SEGMENTS

Segmentation was customized to O.C. Tanner's business and based on likelihood of purchasing O.C. Tanner's solutions and competitive factors.

MARKETING MIX / OFFER

As an introduction to the O.C. Tanner value proposition, leads in every segment received a copy of O.C. Tanner's best-selling business book, "Great Work."

Buying Plans

BULLSEYE SEGMENT

The top-priority segment was companies implementing strategic HR initiatives in the next 12 months.

Direct mail included "Great Work" and $50 Starbucks Gift Card.

Strategy
Deliver a high-value offer to the highest-priority leads to "softened the phones" for the sales reps.

Goal
Facilitate face-to-face interaction between the prospect and O.C. Tanner sales team.

"The mailer gave the team something tangible to follow up on: a good reason to call and make a personal introduction," said House.

Pains & Challenges

With the buyers identified, SALES focused their time and telephone activity on the hottest opportunities.

Go here to get your **$50 eGift Starbucks Card** emailed to your inbox: **octanner.com/inspire**

RESULTS

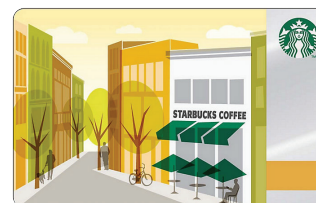The results were swift and stellar.

> BASED ON THIS PROGRAM, WE SAW TWO OR THREE RFPS COME IN ALMOST IMMEDIATELY."
> - T. Nilsson.

DISPLACEMENT SEGMENT

The 2nd-Tier segment of companies indicated dissatisfaction with their current HR appreciation vendors.

Budgets

Direct mail included "Great Work" and an offer to visit O.C. Tanner's website to receive either a $25 or $15 Starbucks Gift Card.

Leads randomly received the $15 or $25 gift card—testing the effects of monetary value.

Strategy

Leads in the 2nd segment visited an online landing page with messaging referencing current pain points to complete a Web form in order to redeem the Starbucks gift card.

Funneling leads into a digital channels allowed lower-priority leads to learn more about O.C. Tanner via a lower-cost channel.

O.C. TANNER
appreciate.

Free Starbucks? New insights?
Yes, please.

We all have a universal need to feel appreciated. And the right kind of appreciation can inspire great work within all of us.

O.C. Tanner's industry-leading employee recognition and rewards programs can help your company inspire and appreciate job performance that will drive engagement, loyalty and your bottom line.

The Starbucks word mark and the Starbucks Logos are trademarks of Starbucks Corporation. Starbucks is also the owner of the Copyrights in the Starbucks Logo and the Starbucks Card designs. All rights reserved. Starbucks is not a participating partner or sponsor in this offer.

Get your $15 Starbucks eCard
Fill out the form below and we'll email it to your inbox.

First name *

Last name *

Organization name *

Email address *

GET MY CARD ▸

STARBUCKS CARD

JOIN OUR COMMUNITY

> OUR SUCCESSFUL RELATIONSHIP WITH BAO TRANSLATED INTO A REALLY GOOD RELATIONSHIP WITH OUR SALES ORGANIZATION. AND, FROM A BUSINESS STANDPOINT, THAT'S IMPORTANT FOR US. THIS IS OUR MOST STRATEGIC TARGETED PROGRAM RIGHT NOW—AND, BASED ON THE RESULTS AND THE ENTHUSIASM WE SAW FROM THE FIELD, WE WERE ABLE TO GET THIS FROM A SMALL PILOT TO A BOARD OF DIRECTORS-APPROVED PROGRAM.
>
> - N. House

GREENFIELD SEGMENT

The 3rd-Tier segment included companies that had no HR awards/appreciation solution in place or handled the function in-house.

Competitive Presence

Direct mail included "Great Work" and an offer to visit O.C. Tanner's website to receive either a $25 or $15 Starbucks Gift Card.

Leads randomly received the $15 or $25 gift card—testing the effects of monetary value.

Strategy

Leads in the 3rd segment visited a different online landing page from segment 2, which included Greenfield messaging to complete a Web form to redeem the Starbucks gift card.

Choosing primarily a digital strategy allowed lower priority leads to learn more about O.C. Tanner via lower cost channel.

GREAT WORK
DAVID STURT

Get your $25 Starbucks eCard
Fill out the form below and we'll email it to your inbox.

First name *

Last name *

Organization name *

Email address *

GET MY CARD ▸

By collecting and understanding each leads digital footprint, marketing was able to trigger targeted lead nurture tracks to help accelerate lower priority leads along their buying journey.

Beyond fueling their demand generation efforts, House and Nilsson recognized additional use cases for the OppID™ intelligence across other areas of O.C. Tanner:

GO-TO-MARKET STRATEGY

"We have unprecedented insight into the makeup of our market now. We know where there are immediate opportunities and where there's a need for more education. We know where the competitors are. This has been huge from a market research standpoint, and it will help us drive overall business strategy....We know whether or not our targets are satisfied with competitors—and why."
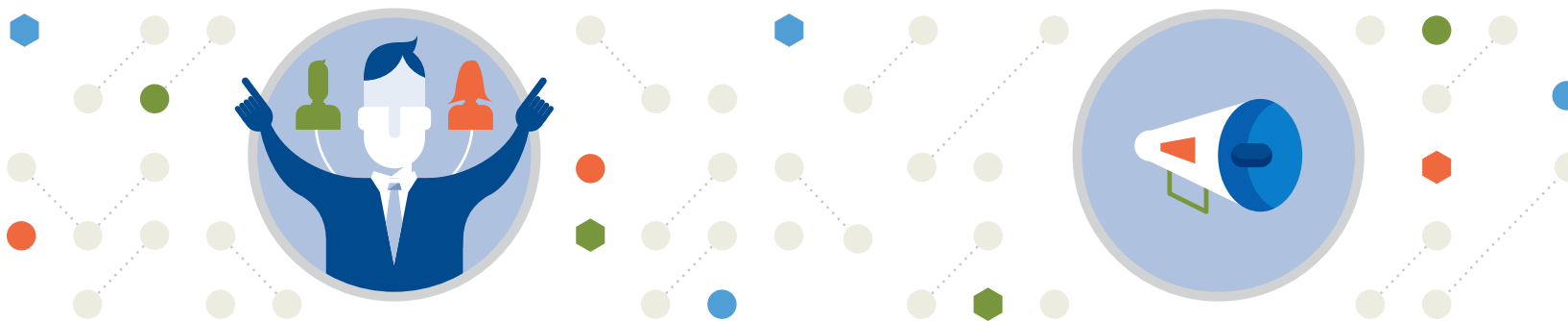
- T. Nilsson

PRODUCT DEVELOPMENT

"Because we worked closely with BAO to create the OppID™ survey, we were able to include questions that will help shape our products, like what kind of functionality our prospects are looking for, what kind of customization options they want, how they define and prioritize ease of use. We're hearing the voice of our customer—and we're listening."

- T. Nilsson

BRANDING, POSITIONING, CONTENT MARKETING, & WEB

"We now have insight into exactly who makes up our target audience, what's important to them, and what they're looking for. This will impact everything from our Web architecture to the kind of content we offer and how we position ourselves."

- T. Nilsson

BAO

About BAO

BAO is the de facto partner for sales and marketing teams in the high-tech industry developing powerful, profitable go-to-market strategies. BAO gives organizations the real-time insight, tools, and resources they need to transform their businesses—to drive new revenue while increasing the profitability of existing accounts, to optimize sales and marketing operations, to kill the competition, or all of the above. Founded in 1997, BAO is based in Andover, Massachusetts. Learn more at www.baoinc.com.

On sales & marketing alignment, House added, "Our successful relationship with BAO translated into a really good relationship with our sales organization. And, from a business standpoint, that's important for us. This is our most strategic targeted program right now—and, based on the results and the enthusiasm we saw from the field, we were able to get this from a small pilot to a Board of Directors-approved program. One of my personal goals was to demonstrate that marketing is a revenue-generating function, and we've done that."

Nilsson said, "Our BAO team understands our business and is always able to take something new from the results. The proactivity blew me away. They consistently propose new and different ideas to optimize and tweak the program for maximum results. That's what I expect, but BAO far exceeded that expectation. The benefits? Just…everything. This is the type of relationship I wish we had with all of our vendors."