BAO

BEST PRACTICES *for* ADDING OPPID™ PROFILES INTO YOUR MARKETING SYSTEMS

Opportunity Identification (OppID™) gathers custom intelligence and buyer signals about your target market.

The power of OppID is the real-time intelligence you get. OppID proactively gathers the exact information you need to set your sales and marketing teams up for success.

Adding OppID intelligence into your marketing systems is perhaps the most important step you can take to ensure that those insights are utilized across your campaigns and touch points in a scalable manner.

Every system is a little different.

Every organization's marketing and sales systems are tailored to their individual needs, business processes, and unique requirements.

Because of that, this document offers high-level guidance and refers to the two most common systems utilized by marketers: **customer relationship management (CRM)** and **marketing automation**.

And because every OppID is delivered as a spreadsheet, it's easy to import into any system, like an account-based marketing (ABM) or ad tech platform.

MARKETING Systems

To ensure that your entire marketing team is able to integrate OppID account insights into their respective activities, it's imperative to upload those details into your CRM and/or marketing automation platforms.

1 *Map to the account screen*

The first step is to map the insights gathered through the survey to relevant fields that already exist in your systems.

As most CRMs differentiate between accounts and leads, a good place to start is the "account" screen. If your organization already has an area on the account screen for tracking various qualification points about prospect accounts, then that area is a logical home for the type of insights that OppID typically collects.

2 *Build fields*

If your OppID project has collected data points that don't already have a "home" in your systems, but are valuable to maintain, build new fields for them. Pre-populating pick lists with responses is a good way to standardize answers across accounts.

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3 ***Upload***

Once your insights are mapped to existing fields, or new fields have been built to capture your data points, add the answers into the appropriate accounts with a quick CSV upload.

4 ***Spot check***

After you've uploaded everything, conduct a spot check of the accounts that you've updated to make sure the data in your CRM matches your OppID deliverable.

PERSONALIZE WITH TOKENS

Once OppIDs are uploaded to your systems, utilize token functionality provided with your marketing automation system to personalize your communications at scale.

The most common use cases to scale personalized communications include **email subject lines**, **segmentation**, and **customized messaging on landing pages**.

SINGLE QUESTION, MULTIPLE ANSWERS

In some cases, the prospect we interview during the OppID process could provide multiple answers to a single question. An example of a question like this would be "What types of challenges do you regularly experience with your Big Data platform?" If a prospect provides multiple answers, for example latency/performance and integration with other applications, both answers will be captured and included in your OppID deliverable.

Think about how you want to store and manage this data in your systems. If your marketing team has a planned use case for this data point, say in email subject lines, think about the impact it will have if some accounts have multiple answers stored in your systems instead of just one.

CONTACTS

Every OppID profile includes the contact information for the individual who was interviewed by the BAO Market Research Specialist. You will get their first and last name, of course, as well as title, phone number, and email.

There is also an "email validated" field that tells you if the email address was confirmed. You'll want to review that contact and add it to your systems via CSV upload.

TIP

For more best practices on integrating OppIDs into your marketing, check out *Acting on Your Opportunity Identification (OppID) Insights: Campaign Ideas for Marketers.*

TIP

Schedule communications around prospect milestones

Some insights that OppID clients capture are time-sensitive, such as contract expiration dates. In this case, you can plan ahead and time communications accordingly. In some cases, it might make sense to stamp the OppID data in your marketing automation system with the collection date for clarity.