

Customer: TripActions

Industry: Cloud-based corporate travel and expense platform

URL: www.tripactions.com

Company Background: Fast becoming the default for corporate travel and expenses, TripActions is the leading, cloud-based T&E platform that combines industry-leading tech with best-in-class travel agents.

CASE STUDY

TripActions Dramatically Improves Conversion Rates with Full Circle Insights

The Challenge: The marketing team desired a comprehensive view of funnel performance, so they could confidently attribute revenue to better optimize processes and investments.

TripActions SVP of Growth and Systems, Ryan Schwartz, has been a thought leader for advanced marketing and sales technology stacks for nearly 15 years. He knows the need for a comprehensive understanding of funnel performance is imperative, including attribution and opportunity sourcing data, a way to track campaign performance over time, and the ability to compare results across campaigns and teams.

Prior to implementing Full Circle Insights, the team had been using a hybrid solution built on the CRM system as well as basic funnel and attribution tools from other technologies in their stack, but Schwartz found gaps. He wanted to tell marketing's story in terms of revenue generated and opportunities sourced. But in order to do so, he would require a funnel structure that would enable alignment with the sales team around a single source of truth: the CRM.

Full Circle Insights Fulfills Key Marketing Criteria

In a previous marketing leader role at another company, Schwartz had used Full Circle Insights. He was familiar with the performance solution Full Circle could provide and knew it would meet his key criteria, which included:

- Native CRM architecture
- Multiple trips through the funnel
- Point-in-time funnel reports
- Strong influence and attribution models
- Rich funnel stage and velocity metrics

No competitor martech solution matched that comprehensive funnel visibility, so the TripActions team implemented Full Circle Insights.

The Solution: Full Circle's CRM-native solution aligns cross-functional groups around data that allows TripActions to make smarter marketing investments.

Now, Schwartz uses Full Circle to measure inbound/outbound marketing and demand gen performance. He also notes that Full Circle is critical for measuring marketing and sales performance; it generates data used in cross-functional team meetings to make decisions on how to maximize conversions and optimize campaigns, processes, team performance and marketing investments.

“ Full Circle gives you the data to make smarter decisions and become an analytical marketer. It removes anecdotes and intuition from the equation.

I have 40 technologies in my tech stack. Full Circle Insights is in my top three. I depend on Full Circle because it gets to the funnel source and gives me the tools I need to correctly attribute revenue and track campaign and team performance over time.”

Ryan Schwartz
SVP of Growth and Systems
TripActions

Schwartz and his team also use Full Circle to generate reports for board meetings, quarterly business reviews and quarterly campaign analytics evaluations. With full funnel visibility, TripActions leaders can drill down to evaluate performance at the campaign and team level, benchmark campaign performance by type, analyze performance over time and make smarter marketing investments.

The Result: Greater process and investment efficiency, better internal alignment and a true vendor partnership that positions TripActions to lead the market instead of chasing it.

Since implementing Full Circle, TripActions has dramatically improved conversion rates and speed-to-lead metrics. Schwartz says the marketing team has also reduced costs because now they know where to invest based on data, not intuition or anecdotes. The comprehensive view of funnel performance allows the TripActions team to embrace their role as analytical marketers.

For the first time in his career, Schwartz is able to produce highly accurate marketing forecasts. Thanks to Full Circle, he can create detailed models that predict funnel stage volumes and velocities, and he can use the metrics to make sure teams stay on track. He uses forecast models to manage demand gen, budgets, campaigns and personnel from the top of the funnel to the bottom, all with an unprecedented degree of accuracy.

Full Circle Insights provides the data and trendlines TripActions needs to pivot toward opportunities and make course corrections. For example, if the data highlights a sales rep's success converting a specific persona and another rep's success in converting a different persona type, TripActions can educate sales reps to maximize conversions across both types of personas, improving sales across the board.

That level of granularity is key—Schwartz says that using Full Circle allows him to expand the array of key performance indicators he monitors from five to 20. As an analytical marketer, Schwartz can now demonstrate impact and confidently make investment decisions. As Schwartz notes, “You can't lead a market that you are chasing.” With Full Circle Insights, TripActions leads the market.

Full Circle Insights gives the TripActions marketing team the tools they need to:

- Stop relying on anecdotes and intuition and become analytical marketers
- Continuously optimize spend and improve process efficiency
- Demonstrate marketing's impact and allocate campaign investments confidently
- Align marketing and sales around a single source of data truth: the CRM
- Correctly attribute revenue and create accurate marketing forecasts

For more information:
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