

Customer: Apptio

Industry: Software-as-a-Service

URL: www.apptio.com

Company Background: Apptio gives its customers the power of trusted, actionable insights to connect technology investment decisions to strategic business outcomes. Apptio's solutions allow customers to capture ideas and prioritize work, embrace the cloud, and optimize their technology investments.

CASE STUDY

Apptio Gains Confidence in Marketing Data and Forecast Accuracy with Full Circle Insights

The Challenge: The marketing operations team needed a better way to accurately attribute revenue, conduct ROI analysis, monitor funnel metrics and produce credible reports.

Apptio VP of Marketing Operations John Lewellan used to rely on mostly manual methods to get the critical data he needed on lead progression through the funnel and pipeline creation. He consolidated data from out-of-the-box tools, which he describes as a kludgy, labor-intensive process that didn't yield all the metrics and reporting he wanted. He was looking for a way to achieve greater efficiency in marketing operations and better alignment with the department's sales development reps (SDRs).

When they joined Apptio, Lewellan and Director of Marketing Operations Tim Gilbert inherited a CRM instance that needed to be re-configured. They also inherited a marketing performance management solution neither had used before: Full Circle Insights. They knew what capabilities they needed, so they faced a choice: build custom tools in-house, buy a different solution or go with Full Circle. After exploring their options and learning what the software could do, they chose Full Circle.

The Solution: With Full Circle's native CRM solution, Apptio gets more accurate attribution, plus the funnel tracking capabilities that are essential for reporting and better alignment with SDRs.

Apptio's marketing operations team worked closely with Full Circle Insights to reimplement the marketing performance management solution as Apptio rolled out its new CRM instance. Lewellan and Gilbert were both impressed by the level of support Full Circle provided—and with the solution's capabilities. Their favorite features include the reactivation function, which helps marketing operations ensure that the team gets fair attribution for opportunity sourcing, and Full Circle's flexible lead scoring.

Lewellan and Gilbert agree that the funnel metrics Full Circle Insights provides are essential for reporting. Full Circle's funnel tracking tools provide unmatched visibility into campaign performance, which comes in handy during meetings with the SDR team, field marketing and sales operations colleagues. The groups conduct in-depth data analysis using Full Circle data to get aligned regarding definitions within the CRM for better alignment, especially at the top of the funnel.

The Result: Apptio's marketing operations team now produces more accurate reports and forecasts. They also have a higher level of confidence in their data and plan to expand their use of Full Circle Insights.

Apptio uses Full Circle Insights software to monitor every marketing campaign, assigning funnels, watching responses as they come through the funnel, and tracking leads and conversion rates at every stage. The lead scoring function's flexibility allows the team to ascribe a lead's potential value to the company more accurately, which in turn enables a more efficient use of marketing and sales resources.

Full Circle data gives Apptio's marketing operations team greater visibility into campaign performance with multitouch attribution models that more accurately depict influence during the customer journey. This gives the Apptio team more insight into which campaign types and channel mixes work best from initial lead gen through closed/won business. Full Circle also empowers the marketing team with tools to monitor the pipeline via conversions, allowing Apptio to balance lead volume against targets.

Lewellan and Gilbert report that cleaner data and more accurate reporting make marketing operations more productive overall. They look forward to making more confident decisions about budget allocation with data that will make investing in campaigns more efficient—while improving process efficiency at the same time.

“ Full Circle's funnel tracking capabilities at the CRM campaign-member level are absolutely essential to increase reporting accuracy.

The Full Circle team is incredibly focused on customer success— Full Circle gave us the training and support we needed to take full advantage of their solution's broad capabilities.”

John Lewellan
VP of Marketing Operations
Apptio

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

- Define lookback periods for more accurate attribution via the reactivation feature
- Automate multitouch attribution and more efficiently conduct ROI analysis
- Focus follow-up efforts more effectively with accurate lead scoring
- Create better reports and more reliable forecasts
- Track leads at every funnel stage and closely monitor performance against pipeline goals
- More closely align marketing and sales using metrics inside the company's CRM

For more information:
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