

B2B Marketing Effectiveness

SITUATION

01

Like many B2B marketers, our client was struggling to connect top-of-funnel and bottom-of-funnel activities, representing both a marketing/sales disconnect, and lack of integration between CRM and campaign management tools.

APPROACH

03

- Review current state: tech stack and data connectivity
- Document campaign and technical functions, process and data flows
- Isolate technical integration issues
- Revisit prospect qualification scoring approach
- Reporting and dashboard design and automation

OUTCOME

05

For the first time, our client was able to see full-funnel impact of marketing efforts and report marketing effectiveness measures to the Executive Leadership team, validating results and gaining support for budget planning and increased resource allocation.



02

OBJECTIVES

- Align top-of-funnel marketing activities with sales-driven opportunity identification and conversion
- Derive metrics demonstrating marketing effectiveness
- Optimize campaign planning and execution process
- Define appropriate metrics and measurement approach

04

RESULTS

- Standardized terminology across departments
- Streamlined campaign planning process; aligned on project brief design, standard metrics
- Resolved integration issues between CRM and campaign tools, gained alignment between sales and marketing
- Developed dashboard templates for campaign and periodic reporting



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