

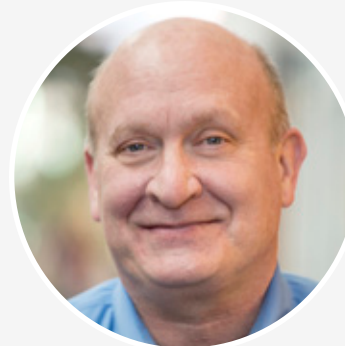


Case Study

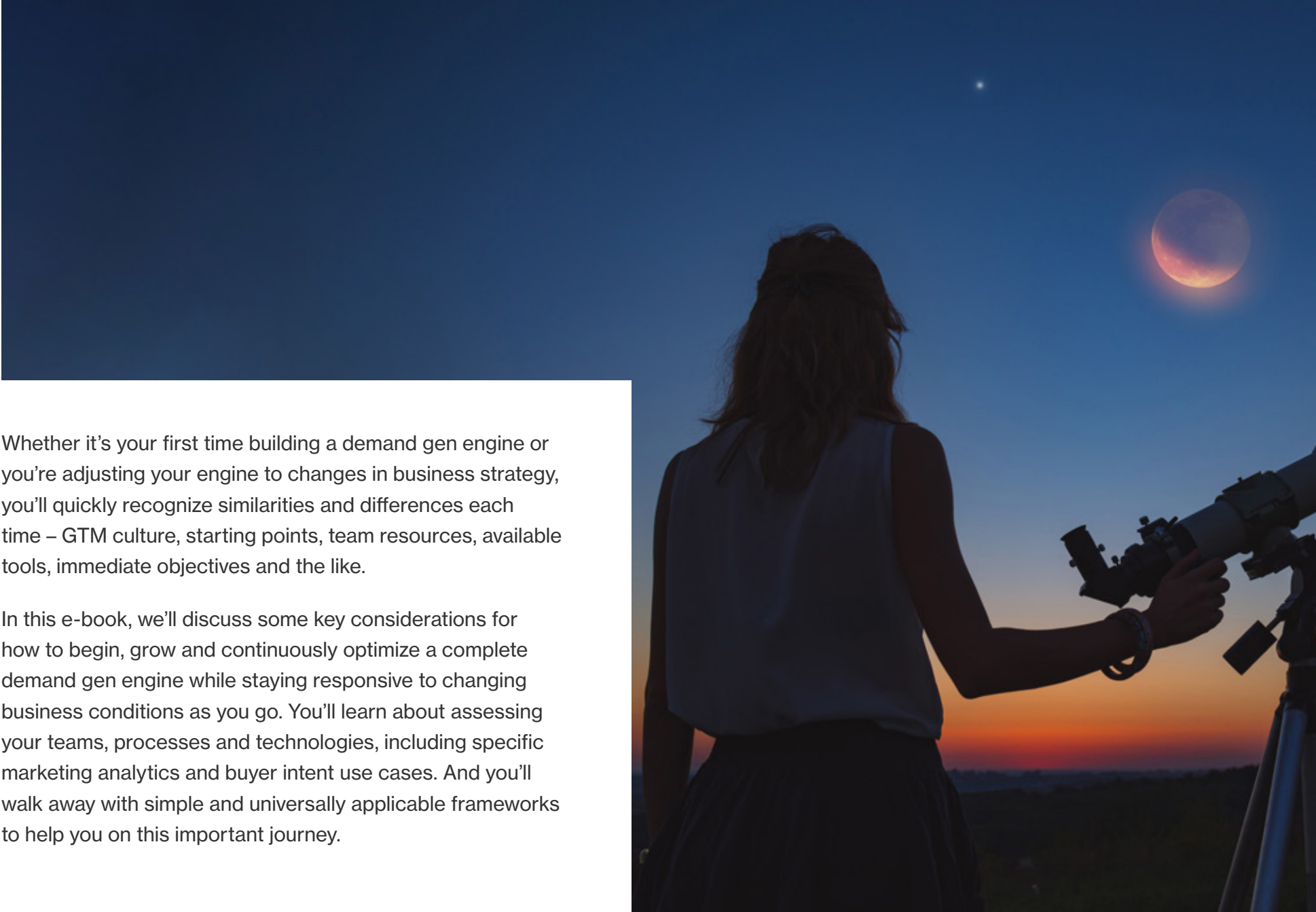
How to Build, Scale & Evolve the Modern Data-Driven Demand Gen Engine



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Whether it's your first time building a demand gen engine or you're adjusting your engine to changes in business strategy, you'll quickly recognize similarities and differences each time – GTM culture, starting points, team resources, available tools, immediate objectives and the like.

In this e-book, we'll discuss some key considerations for how to begin, grow and continuously optimize a complete demand gen engine while staying responsive to changing business conditions as you go. You'll learn about assessing your teams, processes and technologies, including specific marketing analytics and buyer intent use cases. And you'll walk away with simple and universally applicable frameworks to help you on this important journey.

John Steinert



Before jumping into how to bring a modern demand gen engine to life, we want to take a step back to consider what we're really trying to do in demand gen.

This quote from Pete Kazanjy sums up what we're all trying to get at wherever we sit in the GTM – it's about aiding in the process of connecting companies and people with business needs to the providers of appropriate solutions.

“Modern sales [and marketing] is about seeking inefficiencies in the world, finding qualified prospects who have a business pain, but don't know about the solution or need help to find it.”

–Pete Kazanjy, *Foundingsales.com*

For many of us in Marketing, as we move deeper into our careers, we start to focus more on finding active opportunities and in helping Sales create them as well. In this e-book we're going to focus on how you can build your own engine to do this in your business – because, in the end, that's the whole point of B2B marketing!

This is exactly what we focus on at TechTarget as a vendor. Our particular specialty in serving your marketing needs is to aggregate buyers, help you identify them and then assist you in engaging them.

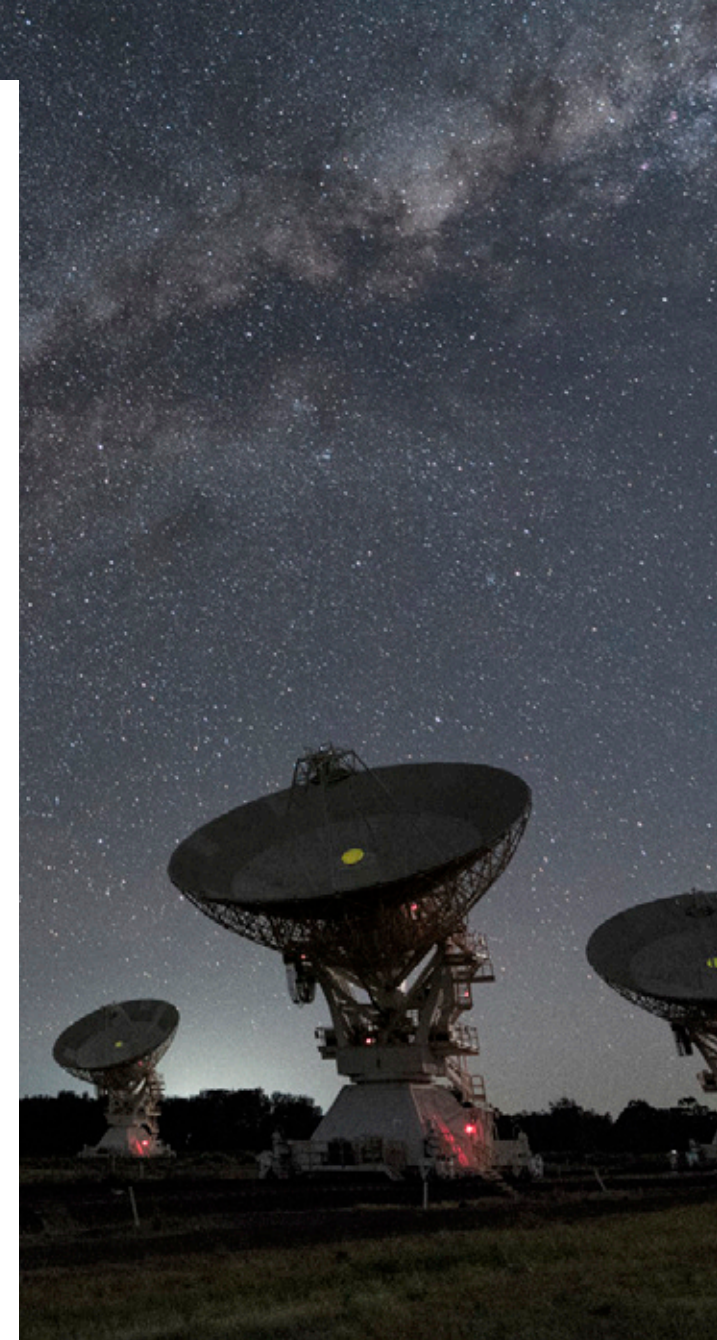
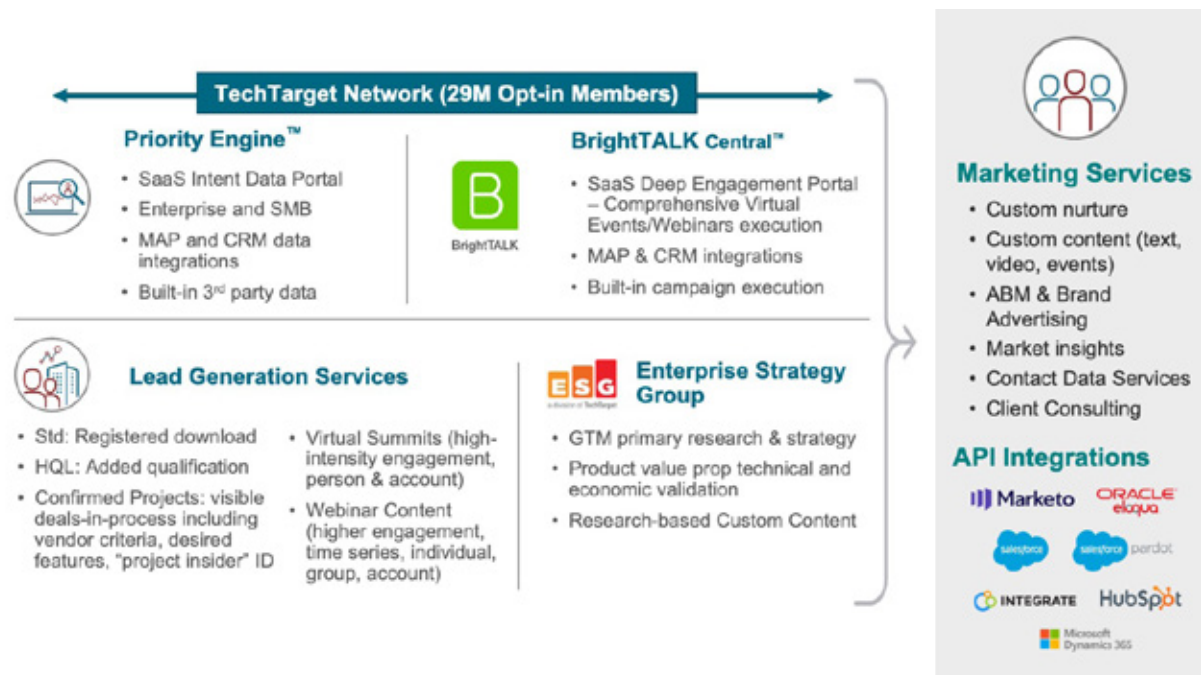
Your focus is on creating more opportunities.

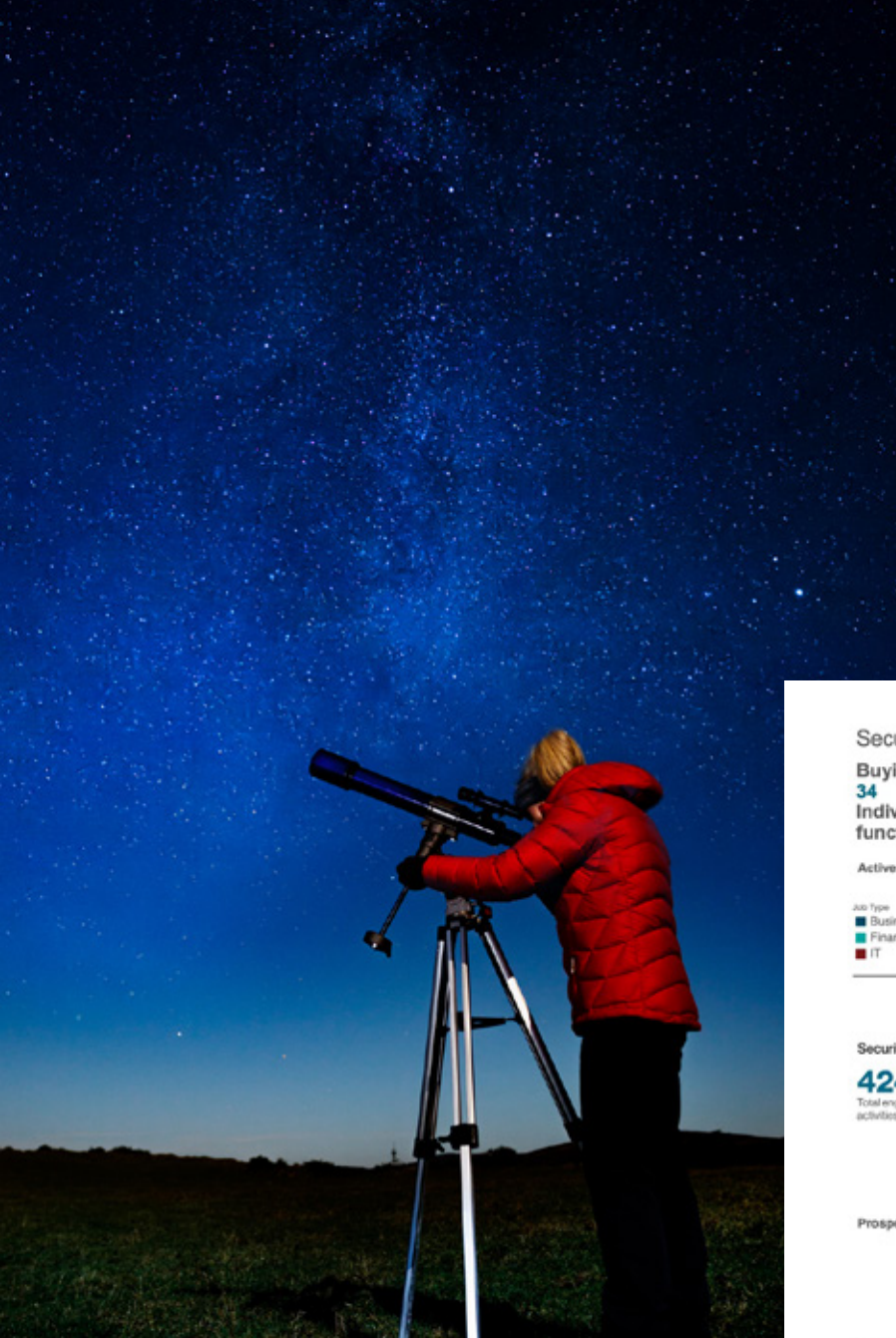
Ours is on aggregating and identifying buyers for you and ensuring you successfully engage.



Networks/platforms and output/service offerings: Engaging the largest source of qualified tech buyers in the world

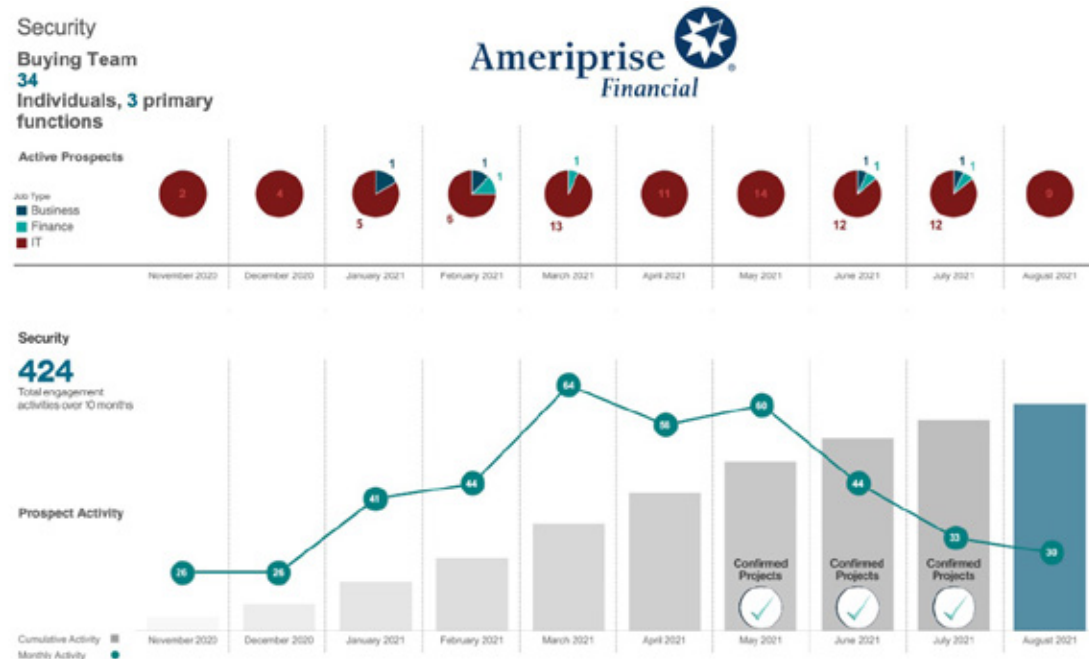
TechTarget helps you execute through three basic platforms. The first is the 29 million people who go to our 150 websites every day to learn, understand their business problems and discover what types of solutions might be available to help fix that. Second is our intent data platform, Priority Engine™, which surfaces those buyers' journeys for you to pursue. And finally, our engagement platform, BrightTALK, which is one method for engaging your audiences very deeply with the video format, through events and webinars. And we have a wealth of other services that help across your GTM, to provide insight, develop better strategy, create strong signals and assist with marketing and sales outcome improvement.





Better identifying buyers' journeys

Here, you can see an example of what an actual buyer's journey looks like when you do a data visualization from the intent data signals uniquely available in our Priority Engine platform. We're looking at activity within the Ameriprise account. This is from real data over about a ten-month period. There's a lot of reporting around how many people are now involved in a B2B buyer's journey. According to Gartner, that number is now up to something like 11 members of a buying group on average. But as you can see from this scenario, in a large account and in a complex solution area like Security, it's actually a lot more. In the mostly red circles at the top, the numbers show how many unique people were active in each month. That's a lot of people that you and your sales team should be influencing and engaging to make sure the deal goes your way.

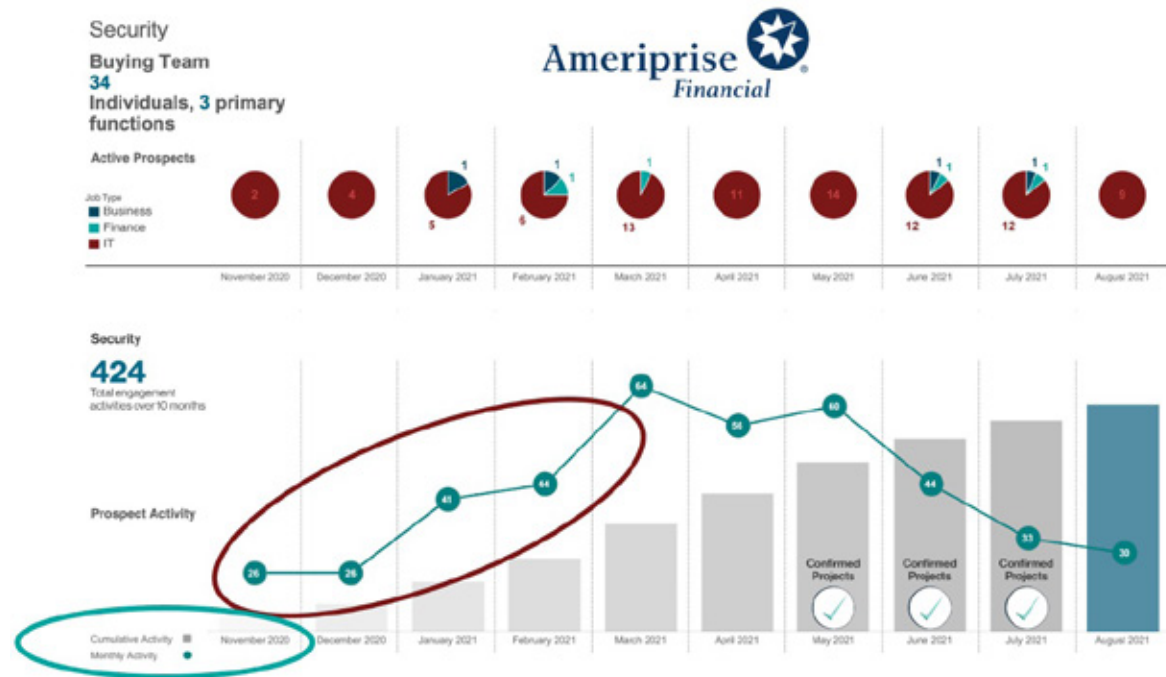


In the lower two-thirds of the chart, the line shows how many total interactions there were from this buying team each month – 424 in all, captured by Priority Engine (from TechTarget’s audiences) and then synced into our client’s systems for use by GTM teams.

In the bottom right, there are some check marks. Those refer to a special type of signal called a Confirmed Project. When we deliver a Confirmed Project, it means that TechTarget has verified that there’s a project actually happening. Think of Confirmed Projects as a form of high-quality or BANT lead. And notice how these come later in the journey. That’s typical of BANT because “Timing” is a key element of the concept and Sales organizations commonly prefer it to be on the shorter, rather than longer, side because shorter inspires them to act rather than wait. The problem is that if you’re going to impact this or any deal to your advantage, waiting too long is a mistake. The point here is that, as you think about your demand gen engine, you’ll want to examine the Sales culture that’s currently operating. If they’re waiting too long, that’s something you’ll need to change. The teal oval here is where Marketing, on its own, should also be doing the hard job of engaging the account on behalf of Sales, potentially in the absence of any intent signals at all. Doing this is critical to make

sure that when buying group activity does begin, the given account already knows you and starts looking to you, through your website and your syndicated content, for advice and guidance.

As marketers, when we think about how to create the most productive demand gen engine, we need to think of ways we can A) assist salespeople when there is a buyer’s journey and B) augment sales coverage of accounts when there isn’t. Now let’s get to know our client Talkdesk a bit better, and then we’ll dive into how they’ve gone about building their engine.



Talkdesk, a leading Contact Center as a Service (CCaaS) player, provides a better way for organizations to intelligently unlock the promise and potential of great customer experience. Founded in 2011, they've been a client of TechTarget since 2018. They've seen incredible growth and are now valued at \$10B – which makes them a 10X unicorn! Part of their success has certainly been their ability to rapidly build, grow and evolve their demand gen engine, in large part due to having Mervyn Alamgir, VP of Demand Gen, at the helm of the effort. Mervyn has built a demand gen engine several times and with each situation and iteration, he's learned important lessons.

2021 Magic Quadrant for Contact Center as a Service (CCaaS)

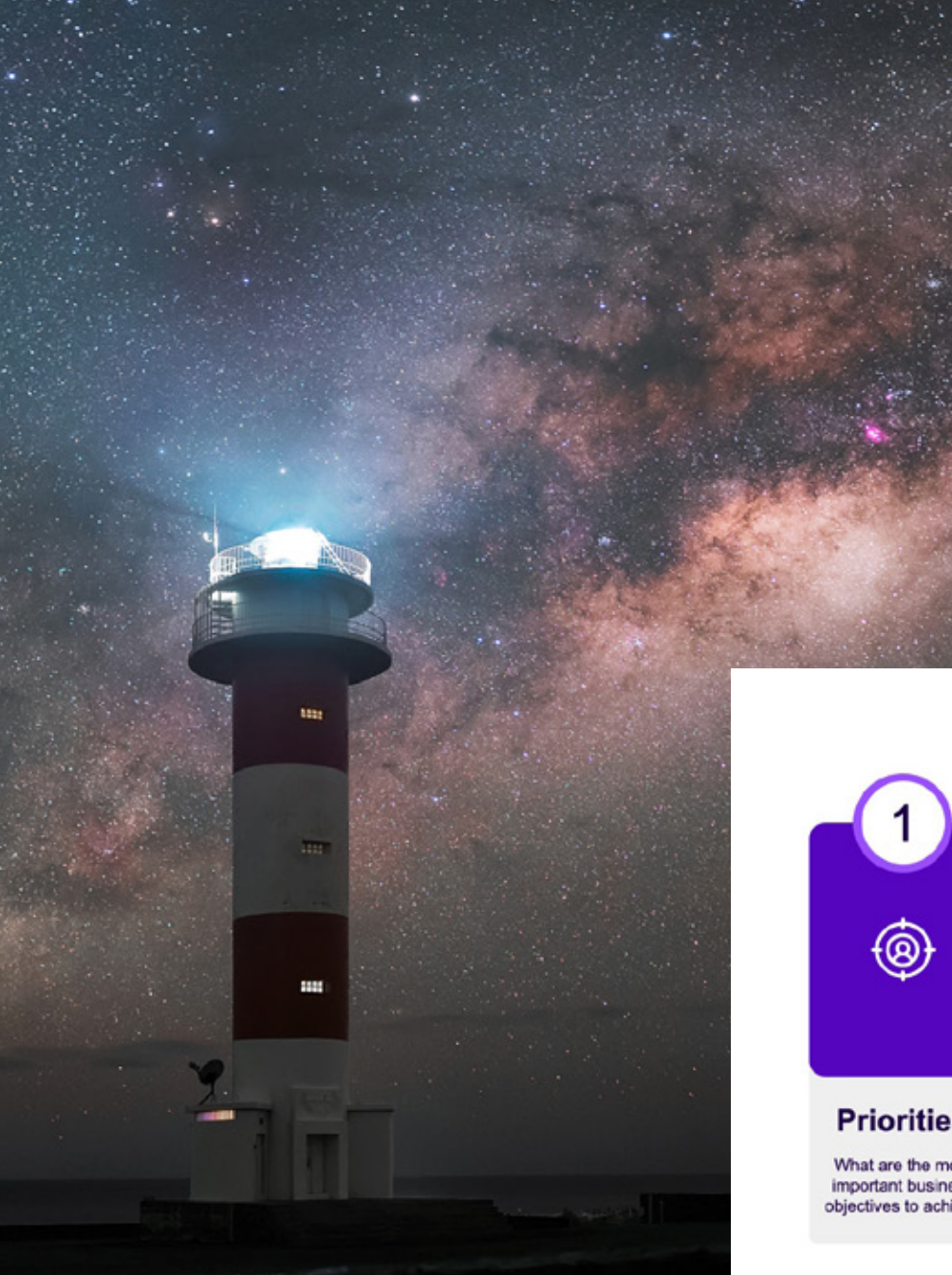


Mervyn Alamgir



How Talkdesk built their demand gen engine

I think everybody who's touched and tried to build a demand gen engine realizes that it's not something where you can just talk to 10 vendors and bring them in to be up and running tomorrow. So, I'm going to share my step-by-step approach to building ours and how we mapped that engine to our business needs rather than exclusively prioritizing the needs of our Marketing team. In the process, I'll explore a bit around how to build in flexibility, so it can adjust to your business model as it evolves.



From business strategy to demand generation

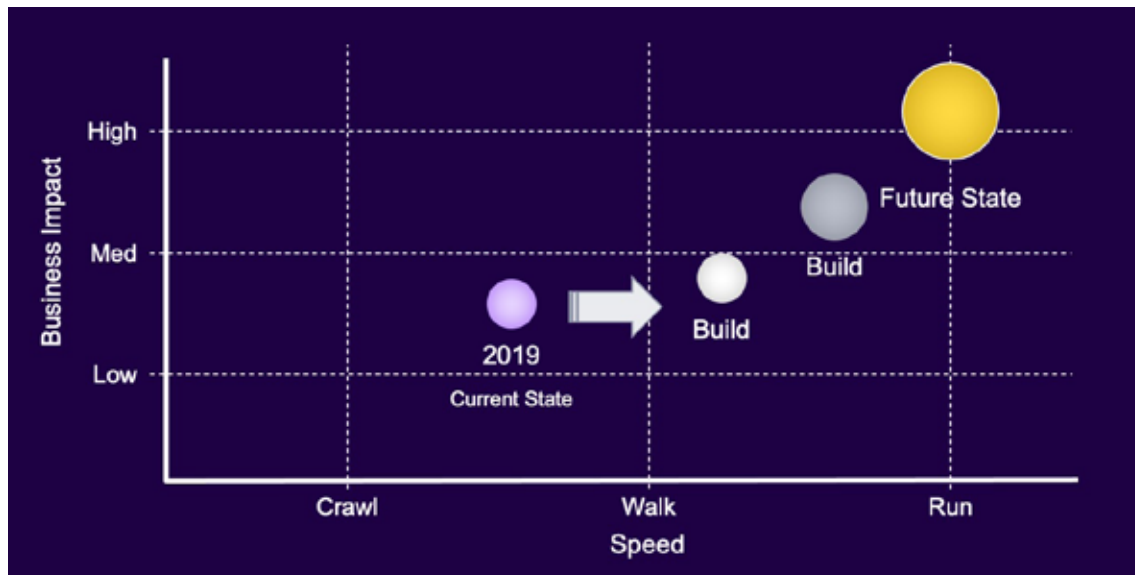
Before jumping into a demand gen-specific build, it's important to have a clear understanding of your business strategy because that determines where your emphasis should be. Early on, your CEO, board and executive team will map out where you need to be in six months, one year, etc. From that plan, your Sales organization will then identify what goals they need to achieve in order to hit their revenue numbers. These are important inputs into how you want to prioritize your demand gen engine because you'll need to have the skills, tools and processes to meet the priority needs they've established. So, when you think about this sequence, your priorities and strategy have to be developed first, in order for the demand gen engine to really be effective against the priorities set by leadership.



Source: © 2022 Talkdesk

Building for impact

In 2019, Talkdesk was beginning to move from a “crawl” to a “walk.” As a startup in a competitive space, moving quickly was a competitive advantage because our larger competitors are less agile. But with speed must come impact. You have to be able to both move fast and show you’ve made a significant impact. So, when we look at where we were in 2019, we had been able to move, but not as fast as we wanted. And we also weren’t having as big of an impact as we could. Looking to the future, our goal was to be in the top right of the chart. That was our future state. But going from where we were to that future state was not a one-month or a six-month journey, it was a step-by-step, planned-out build. And understanding how to build those steps is critical to completing the journey successfully.



Source: © 2022 Talkdesk

What were the specific KPIs that Talkdesk was driving towards?



As a leader of a demand gen organization there's understandably a lot of pressure to develop and improve pipeline – that's why your CMO or CEO brings you in in the first place! So, as you build, you still have to focus on your short-term objectives as well. You have to continue lead gen and improve pipeline. At the same time, you're building this longer-term view of where your organization and demand gen engine need to be in order to achieve a truly meaningful size. Because if you're just doing what you're doing today, you may be able to grow at something like 2-5%. But if your goal is to double in size or more, you need to think about ways you can dramatically increase and accelerate.

Analyze the current state to meet aligned goals

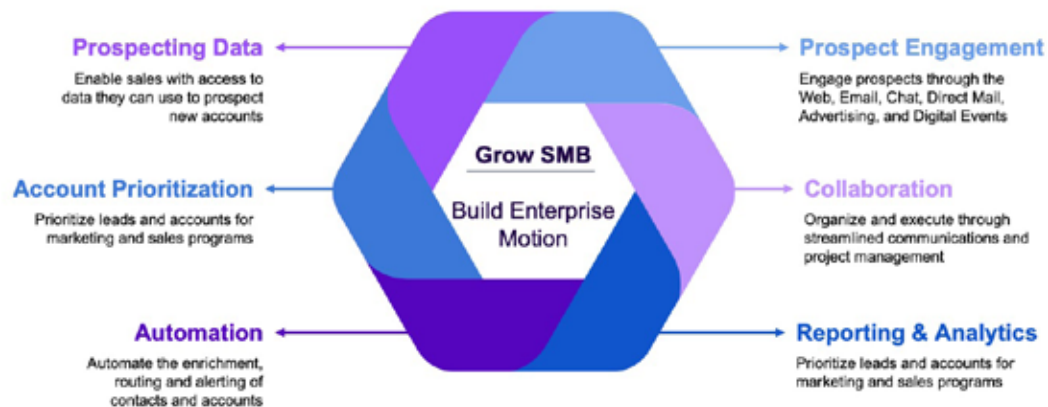
Starting in 2019 our focus was to grow our SME business and start to build out our enterprise motion. With that in mind, we came up with six areas that we needed to focus on:

- 1. Prospecting data.** We wanted to make sure that our sales team had the right information to prospect and identify new accounts and, especially, to know who within those accounts to engage with.
- 2. Account prioritization.** We wanted Sales to have a really good prioritized list of accounts, including insights on why an account is prioritized, making it easy for them to act on the data.
- 3. Automation.** To achieve the speed we wanted, we needed to minimize manual effort as much as possible. One way to achieve that was to utilize automation throughout as much of our tech stack as possible.
- 4. Prospect engagement.** We know that the majority of buyer engagement is digital. So, we needed to improve how we engaged with prospects through the website, what kind of activity and content we build, how we get buyers the content, and how we measure that effectiveness.
- 5. Collaboration.** Because there are so many roles within the entire GTM, and each of these teams

is focused on achieving their individual goals, inspiring and enabling collaboration is critical to ensuring everyone is on the same page. By having the right tools to drive collaboration our teams can run faster and have a bigger impact.






- 6. Reporting and analytics.** There's so much data available to us. The challenge is to translate it into something that's actually useful and actionable. So, we needed to build something that would bring data together and share insights to our Sales and Marketing teams, so they're empowered to evolve their own strategies and actions.

These six categories are specific for Talkdesk. The categories could be very different for your organization, depending on what your business needs are. The point is that you should understand and act on what's going to be needed for your company to succeed.

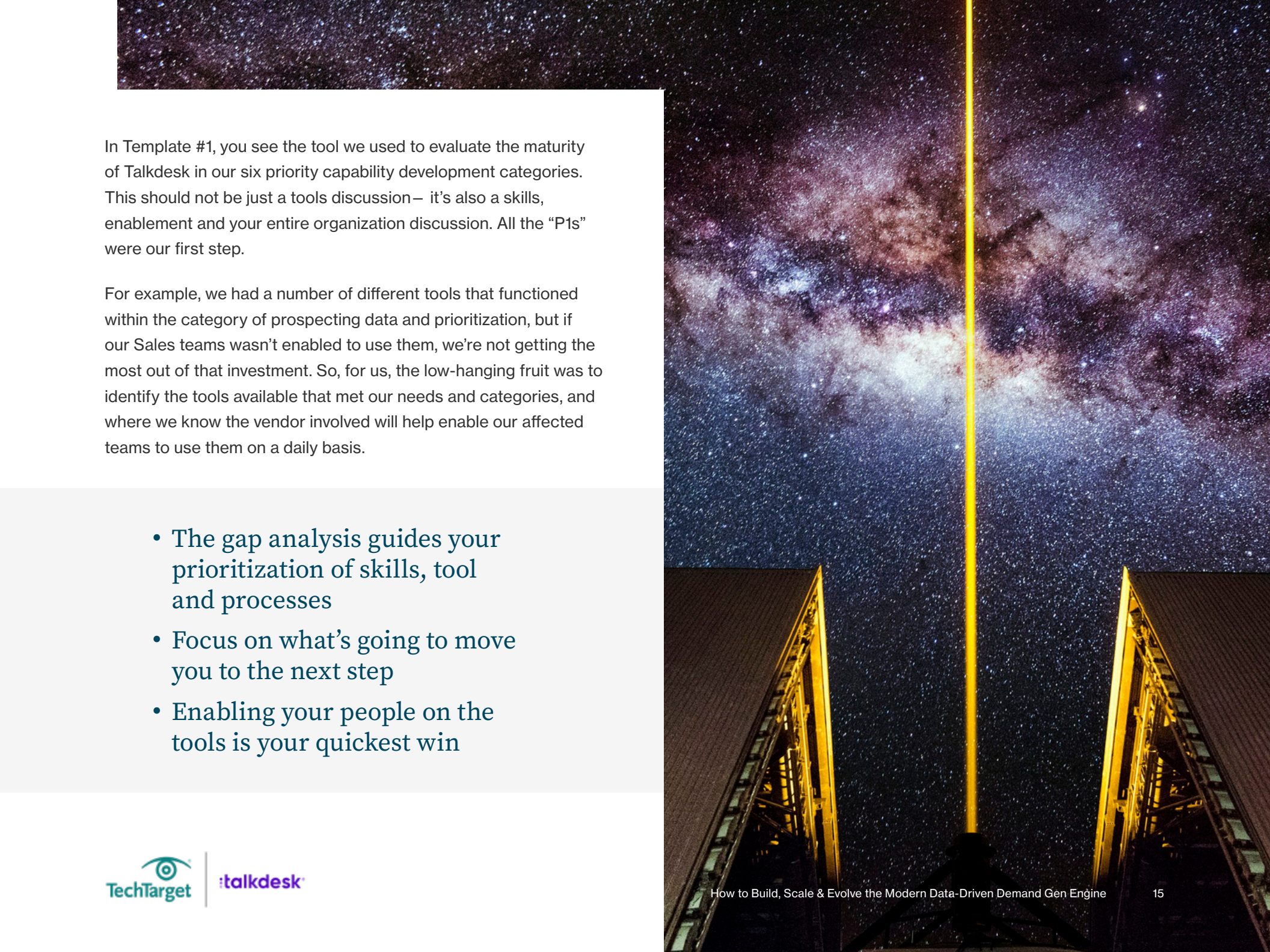


Source: © 2022 Talkdesk

Template #1: Mapping to business needs

		Prospecting Data	Account or Lead Prioritization	Prospect Engagement	Automation	Reporting & Analytics	Internal Collaboration
Level 5	 Predict						
Level 4	 Optimize			P1			
Level 3	 Automate	P1	P1	P1			P1
Level 2	 Enable	P1	P1			P1	P1
Level 1	 Baseline					P1	

Source: © 2022 Talkdesk



In Template #1, you see the tool we used to evaluate the maturity of Talkdesk in our six priority capability development categories. This should not be just a tools discussion— it's also a skills, enablement and your entire organization discussion. All the "P1s" were our first step.

For example, we had a number of different tools that functioned within the category of prospecting data and prioritization, but if our Sales teams wasn't enabled to use them, we're not getting the most out of that investment. So, for us, the low-hanging fruit was to identify the tools available that met our needs and categories, and where we know the vendor involved will help enable our affected teams to use them on a daily basis.

- The gap analysis guides your prioritization of skills, tool and processes
- Focus on what's going to move you to the next step
- Enabling your people on the tools is your quickest win

Prioritize growth into achievable steps

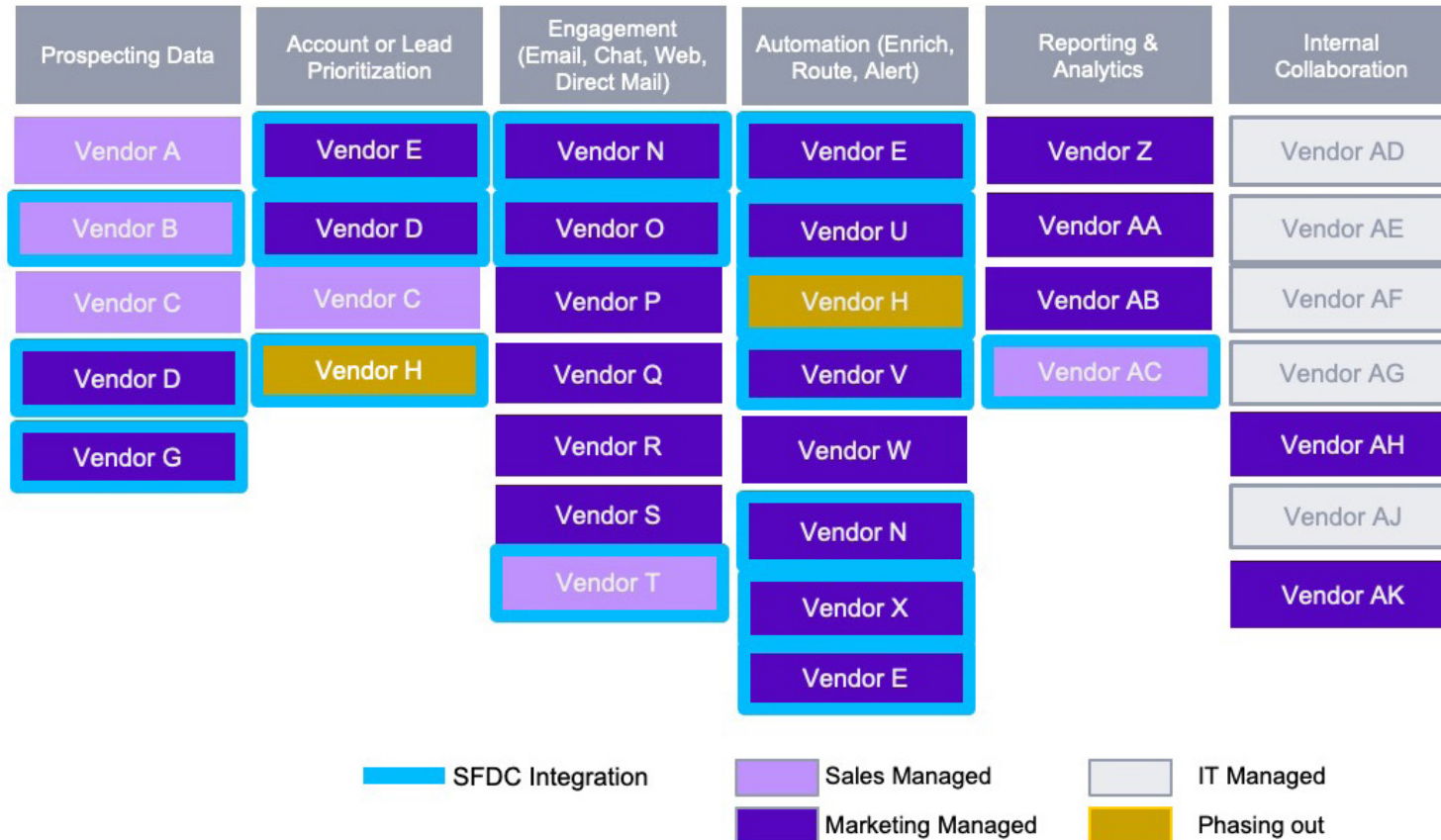
In 2019, we had only four people in our demand gen and operations team. Once we built this plan, we could begin actually tackling the gaps we identified, and as a result, we were able to bring the necessary analytics experience and expertise in house. At that point, our performance marketing team was also outsourced through an agency, so we wanted to bring that expertise in-house as well. And finally, we wanted to have a tool that we could leverage to help our sellers be more effective in

prospecting accounts – that's when we started our engagement with TechTarget's Priority Engine.

With Priority Engine, our sales team can see accounts that are in an active buyer's journey (showing a lot of interest in content that's relevant to our solution). We can also see the specific active individuals within those buyers' journeys, so sellers can begin to open those opportunities up.



Template #2: Vendor mapping



Source: © 2022 Talkdesk

This is the second template we used to continuously review our tech stack within the context of our six categories. We used this to look at each of our vendors in that category, assess them and then manage the entire buying cycle for our growing tech stack. We included the vendors that we were onboarding and offboarding, so we could easily manage the process.

It also gave us a great way to align with other internal organizations that were dependent on or utilizing the marketing tech stack. With our sales operations team this became a great tool for us to align and identify what tools they could also leverage. And it gave our IT organization a comprehensive view of what our tech stack looks like and where they're involved.

- Keep internal teams aligned on vendors and use cases
- Manage vendor lifecycles and evolving business needs








Building collaboration amongst different teams can be a huge challenge. What are some examples of how Talkdesk has built a collaborative environment?

The first key thing we've found to be really helpful during a build out like this is to find individuals within your organization who are potential champions – whether it's someone in Sales or Finance, etc. They're the ones that will go sit in meetings and help you promote your agenda. Second, you have to be able to drive continuous alignment around priorities. As part of this, you need to allow other teams the opportunity to provide their own input, because that's ultimately a great way to get their buy-in on your actions. For example, it will help drive agreement across the organization that “this is the campaign we want to run, this is how we're going to run it, this is who we're going to target.”

Build a vision to the future state

Now if we turn back to our mapping of the categories against maturity, once we finished the first step, we could move on to the second step. And for Talkdesk, that second step was going into a higher level of optimization, specifically account optimization, because we wanted to be able to digest all of the data we were collecting, make sense of it and then use it to take action.

		Prospecting Data	Account or Lead Prioritization	Prospect Engagement	Automation	Reporting & Analytics	Internal Collaboration
Level 5	 Predict		P1			P1	
Level 4	 Optimize	P1	P1		P1	P1	P1
Level 3	 Automate					P1	
Level 2	 Enable						
Level 1	 Baseline						

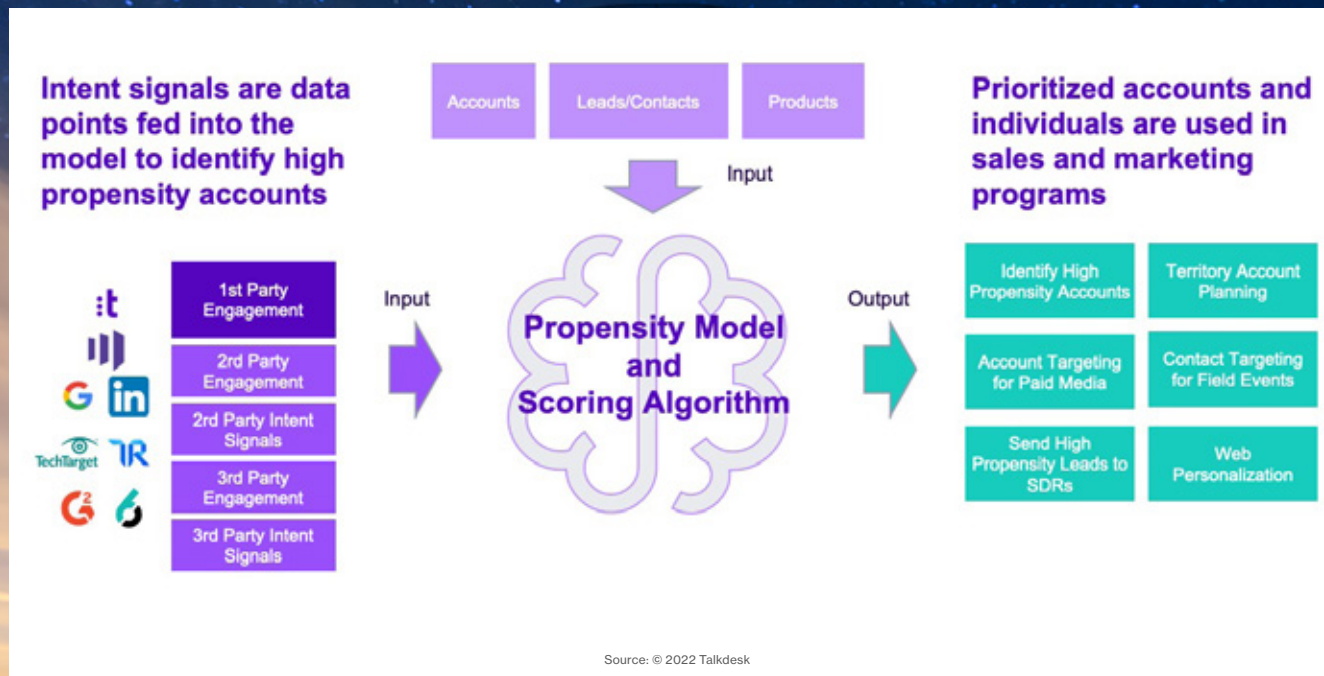
Source: © 2022 Talkdesk

How intent is used across Talkdesk Sales and Marketing

In terms of data, we have first-party data coming from our website and our CRM systems, and second-party and third-party data coming from our business partners. This data is really important for us to use and make sense of, combine with the information that we have (from accounts and contacts in Salesforce), and turn it into something actionable for our Marketing and Sales teams. For example, with this level of insight, Talkdesk

was able to build each of our regional sales teams a list of top accounts to go after.

This became a really core area for us as we moved forward in our build of the demand gen engine. But as you can imagine, if we'd tried to do this back in 2019, we'd have had a lot of gaps, and we probably wouldn't have been able to deliver for the pipeline contribution sought. So that's why it's important to build the steps in a sequence such that you can deliver what your organization needs today and then do even better as you go forward.



How can you enable Sales to be more effective in their prospecting, particularly in the context of using purchase intent data?

Like most organizations out there, one of the most common queries we get from Sales is that they want more leads. And so, the easiest way for us to address that is to give Sales access to the systems or services that will produce high-quality leads. With a system like Priority Engine, we allow each of our reps to go in there and see the accounts that are showing interest in our technology and solutions and the individuals involved in that consideration cycle. From a sales standpoint, you really want your team to have direct access to information like this that is really relevant for them. And if you don't let them see what's actually going into the "sausage machine," based on their limited exposure and understanding, they can easily decide they don't want what you're providing.



Your GTM has changed ... now what?


Of course, along with your maturing capabilities, your GTM focus will change over time. In 2019, our focus was to grow our SME business. Two years later, this has matured to focus on some specific verticals. Because we built our demand gen engine to be flexible and pull in data that allows us to scale, we were able to build new programs that are vertical-based without having to retool or rebuild our entire engine.

This flexible mindset should extend through your GTM and even out to your vendors, so that when your business priorities change, your vendor can change with you too.



How has your team created the content that you needed to drive the engine?

At Talkdesk, content primarily sits not within the demand gen team, but within our product marketing team or a dedicated content creator. Campaign experiments have really helped drive what kind of content we want to create for our demand gen. And when we look at our content needs, we also look at where in the funnel we need support. Over the past year we've done a lot of analysis to understand what content drives new opportunities into our pipeline. We've found that for us, it's demo and product-related content. Of course, we know that those types of content aren't going to work at the very top of the funnel because that's not what people doing initial inquiries in our category will be interested in. So, we work with these teams to make sure we have a mix of top, mid, and bottom-funnel content.

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- Build out your demand gen engine with business outcomes in mind
 - Develop a vision that is achievable through clear steps and with the ability to adapt
 - Drive organizational alignment with data and throughout the process

Evolving your demand gen engine

One huge learning that I've gained from building a demand gen engine at Talkdesk is that you need the right combination of people, tools and processes to succeed at each maturity level. Your tech stack isn't everything. You have to be able to enable your people on those tools and have the right processes surrounding them so you can take advantage of technology-based capabilities. Furthermore, you need really strong communication and collaboration across the organization. These are foundational elements that are very important, regardless of if you're starting from scratch or you're going to an existing B2B organization that may already have a team and you need to scale that team.

About TechTarget

TechTarget (Nasdaq: TTGT) is the global leader in purchase intent-driven marketing and sales services that deliver business impact for enterprise technology companies. By creating abundant, high-quality editorial content across more than 150 highly targeted technology-specific websites and 1,125 channels, TechTarget attracts and nurtures communities of technology buyers researching their companies' information technology needs. By understanding these buyers' content consumption behaviors, TechTarget creates the purchase intent insights that fuel efficient and effective marketing and sales activities for clients around the world.

TechTarget has offices in Boston, London, Munich, New York, Paris, San Francisco, Singapore and Sydney.

For more information, visit techtarget.com and follow us on Twitter [@TechTarget](https://twitter.com/TechTarget).

About TalkDesk

Talkdesk is a global cloud contact center leader for customer-obsessed companies. Talkdesk's automation-first customer experience solutions optimize their customers' most critical customer service processes. Their speed of innovation, vertical expertise, and global footprint reflect their commitment to ensuring that businesses can deliver better experiences across any industry and through any channel, resulting in higher customer satisfaction and accelerated business outcomes.



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About John Steinert

John Steinert leads Corporate Marketing at TechTarget as a hands-on practitioner innovating with internal and client teams alike. In a career spanning two hemispheres and three decades, John's interests are both wide-reaching and demonstrably deep in the B2B space.

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About Mervyn Alamgir

Mervyn Alamgir is the Senior Vice President, Growth Marketing and Operations at Talkdesk. Over the course of his career, both as a practitioner and as a leader, he has been fascinated with and driven by the convergence of technology and marketing to drive business growth. The teams he has built span many marketing disciplines including digital marketing, field marketing, customer marketing, marketing analytics and account-based marketing.

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