

## CASE STUDY

# Marketing Automation Accelerates Revenue Growth



## About Tipalti

As the world's most global supplier payments solution, Tipalti automates the supplier payments operation while maintaining tax and regulatory compliance. In Hebrew, "tipalti" means "I took care of it," which reflects the culture of the company to simplify complexity. By transforming B2B payments one transaction at a time, Tipalti streamlines the way companies make payments to those critical to delivering goods and services. Tipalti automates over 26,000 rules in the payment remittance process on a proven platform that serves over 400,000 payees and \$1.5 billion in payments annually.

## Digital Pi Services Used

- Digital Pi Gold Standard Marketo Implementation
- Salesforce.com Application Integration
- Lead Lifecycle Development
- Inbound Content Marketing and Keyword Analytics
- Revenue Cycle Analytics

## Impact/Results

- Completed marketing automation implementation in less than 75 days!
- Created comprehensive funnel visibility that ties revenue to lead source and marketing contribution
- Achieved 250% annual revenue growth in part due to effectiveness of marketing automation
- Quickly improved inbound campaign effectiveness with keyword and content analysis
- Realized marketing operational excellence with best practices and strategic advice

## CHALLENGE

Tipalti is a cloud-based B2B payment enterprise solution that automates the accounts payable process and takes care of all the minutiae related to managing supplier payment operations so its clients can focus on growing their business. Founded in 2010, the company enjoyed rapid organic growth with excellent client renewal rates, all with very little marketing outreach. In 2014, as the company was scaling its next phase of growth, it recognized the critical need to invest in marketing. They brought on their first Chief Marketing Officer, Rob Israch, to help build out their marketing organization and put in the right reporting systems, programs, and infrastructure to make a marketing machine. As Rob remarks, *"I am definitely a measurement-oriented marketer and we wanted to apply a science-based approach to marketing instead of shooting from the hip. I knew we needed a measurement and reporting system that could be set up right from the beginning."*

## SOLUTION

With the next fiscal year looming just a few short months away and with limited marketing staff on board, the new CMO, Israch, had double duty: to hire people and move fast to implement a brand new marketing strategy and the marketing automation system to support it. *"While simultaneously looking at systems, I knew that we needed a resource for implementation since we did not yet have a marketing operations team in house. Fortunately I found Digital Pi, who worked with me to figure out what made sense both from a Marketo standpoint and for our business long term. They gave me guidance and walked me through a thought process of limitations and options to consider. From the beginning, Digital Pi helped me implement with best practices."*

Israch and Digital Pi put in place an aggressive plan to move the new system through selection to implementation in less than three months. Israch commented, *"Digital Pi came in and were very professional – they were like an employee. Within two and a half months, they made sure we were up and running and made sure that when we were, we had the best practice set up and reporting we needed to support the marketing strategy. And beyond the initial implementation period, they trained the marketing operations people I eventually hired to give me a smooth transition."*

## RESULTS/BUSINESS IMPACT

Digital Pi applied its expertise and close collaboration with the Tipalti team to ensure the success of this new marketing automation implementation. By developing lead scoring and a process flow for lead management along with integrating with Salesforce.com, Tipalti gained the visibility to identify lead data by attributed lead source, bringing a new level of lead source detail previously unavailable. This new level of reporting and

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– Rob Israch  
Chief Marketing Officer, Tipalti

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insight allowed Tipalti to obtain real-time insights all the way down the funnel so the company can tell which leads by source were driving opportunities, sales meetings and ultimately revenue. As Israch stated, “*We went from nothing to a pretty advanced marketing mix in a year with the help of Digital Pi and with very limited resources.*” The resulting business benefits for Tipalti include:

- **Rapid time to value** With design and implementation of the new marketing rolling out in less than 75 days, Tipalti was ready for its next year of growth. According to Israch, “*When I joined in mid-September 2014, I wanted to get our marketing systems all set up for the next fiscal year. We had two and a half months to select a vendor and set up. By October '14, we selected Digital Pi and with such a short time line, we required a fast and yet precise implementation. From a system perspective, the work that Digital Pi did to get us up so quickly was a major benefit for us.*”
- **End-to-end visibility into marketing influence on revenue** The new marketing automation with lead lifecycle analysis delivers complete visibility into leads by source in an intuitive dashboard. Cites Israch, “*It was important that I had a full dashboard of the key metrics live as soon as the system was ready. It was critical to measure, track and understand not just where leads were coming from by source but also which leads by source were driving to opportunities and sales. We now have intuitive reports that give us real-time insights into performance by channel and segments. Digital Pi set it up so that the visibility goes all the way down the funnel. We are now able to attribute everything from marketing sourced leads.*”
- **Increased effectiveness of inbound marketing campaigns** One key question for Tipalti was whether the dollars spent on inbound marketing content, keywords and SEO were driving leads and, if so, which keywords were driving opportunities and sales. “*We wanted to track which paid keyword was searched for in Marketo so that the sales representative knew exactly the pain point the lead had and so that we could understand what campaigns/ad group/keywords were generating opportunities. This was not an intuitive or simple out-of-the-box solution. Digital Pi had to work with my paid keyword agency, Marketo and Salesforce.com to get the right reporting we needed. This was a good accomplishment and we now definitely know exactly which keywords to invest in and which ones not to!*”
- **Data-driven decision making leads to increased revenue growth** Tipalti experienced rapid growth in the year since its Digital Pi Gold Standard Marketo implementation. Israch states, “*The company has grown revenue this past year by 250% and certainly a big part is attributed to marketing coming on board in same time period. We coupled our marketing automation system with a new strategy, upgraded messaging, a new web site, and new programs and campaigns We used data to refine our decisions so we could be more effective. We wouldn't have known what marketing contributed nor which programs to keep investing in without marketing automation, and Digital Pi was essential to that.*”

### About Digital Pi

Digital Pi helps companies deliver rapid, meaningful value from marketing automation. We believe that marketing automation is at the intersection of every facet of marketing from content strategy to messaging.

With our relentless focus on connecting revenue to pipeline, Digital Pi brings together marketing strategy, processes, data and applications to make marketing automation work for your business.

We know the technology and how to get to the business requirements, expertly linking marketing automation to other applications such as CRM, online advertising or even the customer's own cloud-based product, so our clients can understand online customer and prospect behavior.

The work of Digital Pi is specific to each customer. We practice the lost art of listening and asking the right questions to discern your needs, always keeping an eye on revenue and opportunities to apply best practices and standards to streamline your implementation.

When you depend on your marketing automation system, you can't afford to be without an expert who understands your system.

### WHY DIGITAL PI?

With the help of Digital Pi, Tipalti achieved its primary goals for a rapid implementation coupled with intuitive, metric-driven marketing and sales reporting. For Israch, Digital Pi not only laid the foundation for Tipalti to develop a very sophisticated marketing mix in a short time but also created a launch pad for continued growth.

*“Now that we're planning for our next fiscal year, we have it all measured out. Forecasting and planning is so much easier to help drive our growth; it is more of a science because we have the data we need. Digital Pi brought in a lot of best practices. With all of their experience, they were able to give guidance on what made sense for my needs from a business and system perspective. That was a definite positive – it was more than I expected, in fact. The infrastructure and reporting that Digital Pi put in place gave us the marketing foundation we needed to drive 250% growth in revenue in 2015.”*



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