digital Pi™

▽ HELLOSIGN

HelloSign simplifies work for millions of individuals. Over 70,000 companies worldwide trust the HelloSign platform —which includes eSignature, digital workflow and electronic fax solutions with HelloSign, HelloWorks and HelloFax —to automate and manage their most important business transactions

Solution/Services

- Digital Pi Gold Standard Marketo Implementation
- Marketing Automation Reporting
- Lead Lifecycle Development
- Lead Scoring Design and Implementation

Results

- Increased marketing ROI with enhanced visibility across customer lifecycle
- Grew sales leads by more than 40% in the first month
- Empowered sales and marketing for greater efficiency and growth
- Increased sales deal size with more cross-sell and upsell opportunities
- Accelerated go-to-market timeline for campaigns
- Established marketing automation structure for enterprise thought leadership program

Visibility into Lead Lifecycle Accelerates Sales Growth for HelloSign.

INTRODUCTION

HelloSign simplifies work for millions of individuals and over 70,000 companies worldwide who trust the HelloSign platform to manage their most important business transactions. A core value of the company is to "make our users awesome" by delivering products that are easy to use and easy for developers to integrate. With a growth trajectory that now sees the company serving diverse market segments, including some who want a self-service experience and others who require a sales-assisted approach, HelloSign found that it was difficult to nurture and cross-sell effectively across its customer base with its existing marketing automation solution.

Senior Manager of Marketing Campaigns, Growth and Operations, Jackie Davis explains, *"We found ourselves at an inflection point. Our lead volume was growing exponentially. I saw this wave of growth coming toward us, and we were either going to surf it or it would take us under. We had a marketing automation system with two separate databases, and it was difficult if not impossible to cross-sell and nurture across our customer segments. It could take a day or longer to solve any issues and at times more than three days to get a simple email sent out."*

CHALLENGE

With its organically grown system, HelloSign found that new projects would end up competing with one another, so it was difficult for the marketing and sales teams to effectively score and nurture an increasing volume of leads. This became apparent when HelloSign was trying to integrate multiple databases that would grow its marketing database by 20x or 2000%. Without an effective lead scoring system in place, HelloSign urgently needed to unify its database across customer segments. Davis describes the situation: *"We did not have the luxury of a yearlong implementation process. We needed to accelerate our time line. Fortunately we have a leadership team that believes in making investments for the long term. Our chief operating officer had worked with the leadership at Digital Pi before, and together with the recommendation of Marketo, we had an immediate connection to move ahead."*

Confirming the recommendation of her team, Chief Operating Officer, Whitney Bouck who leads sales, marketing, customer operations and business development, says, *"HelloSign's rapid growth created an urgent need to take our Marketo instance to the next level. Digital Pi's gold standard architecture gave us the solid, scalable foundation we wanted to engage prospects and customers at scale."*

SOLUTION

HelloSign started its Digital Pi Gold Standard Marketo Implementation with the basics of lead scoring and a lead lifecycle evaluation across customer segments. As Davis adds, *"I love the Digital Pi Gold Standard; it covers every step with a straightforward, methodical approach that allows for small changes in setup based on our business requirements. It is brilliant, and we are now set up for scale. I have never seen a rock-solid system in place like this for a company our size. And having the documentation in our growth mode is incredible for us as we expand our sales and marketing efforts. Digital Pi's standardized approach helped us capture the best of Marketo and enabled our teams to be more nimble in executing new initiatives with confidence."*

A critical aspect of the solution for HelloSign was the lead scoring and source attribution that was established by Digital Pi. For Davis, this new level of insight was an unexpected benefit of the engagement: *"Digital Pi set us up with clear visibility across our entire customer lifecycle so we could identify a source and channel touches together and understand what is driving success across the entire customer experience. This has been great for leadership to have the data required for resource investment decisions and for the teams to see the value of their work and what is influencing success."*

By establishing this new marketing automation structure, HelloSign was able to successfully launch a strategic thought leadership program for the enterprise called Digital Strength. In order for this program to be successful, HelloSign needed a platform that could isolate and nurture these new leads separately from the company's traditional marketing efforts. Davis elaborates, *"We could not have launched Digital Strength in our old system. Digital Pi enabled us to bring this executive-level initiative, which had eyes on it across the company, to fruition by setting up clear parameters for this new set of leads. Now we have control on how, when and to whom we can market. We were able to establish a circle of trust with our customers so we can build a relationship in a methodical way and deliver on our brand promise to make our users awesome."*

RESULTS/BUSINESS IMPACT

The solution HelloSign implemented with Digital Pi touches not only the marketing and demand generation teams but extends to the sales team and executive management. This collaboration enabled HelloSign to transform its lead lifecycle with a standardized and scalable workflow that grew lead volume exponentially. The new level of visibility across the sales pipeline has allowed HelloSign to align its marketing automation and demand generation with the strategic growth of the business with the following results.

> "Digital Pi helped us make better decisions faster, by being able to measure and know what is having an impact. It has been great for morale, too. The effect has been that everyone can now see the value of their work. Our insights into the customer lifecycle has helped our leadership team make more balanced resource investment decisions across the funnel and not just simply invest at the top of the funnel."
>
> – Jackie Davis, Senior Manager of Marketing Campaigns, Growth and Operations

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>
> – Whitney Bouck, Chief Operating Officer

SUMMARY OF RESULTS

Increased marketing ROI with enhanced visibility across customer lifecycle

With increased insight into the source of each lead, HelloSign was able to see what is really influencing the success of the business. According to Davis, *"Digital Pi helped us make better decisions faster, by being able to measure and know what is having an impact. It has been great for morale, too. The effect has been that everyone can now see the value of their work. Our insights into the customer lifecycle has helped our leadership team make more balanced resource investment decisions across the funnel and not just simply invest at the top of the funnel."*

Grew sales leads by 40% in the first month with more effective lead scoring

With a new process for tagging, scoring and statuses, Digital Pi worked with HelloSign to develop a comprehensive lead lifecycle engine that led to increased lead volume. Davis explains, *"Because Digital Pi set the foundation for us to score our leads, we were able to more effectively identify those who are in our self-service path that should instead be in the hands of sales, making sure that high potential leads are not lost. In fact because of this new efficiency, the number of leads grew by 40% in our first month alone!"*

Empowered teams with greater efficiency

Digital Pi helped HelloSign simplify the creation of marketing campaigns with a new "self-service" model so marketing operations can scale programs across the business. Davis elaborates: *"Instead of having only a few people who could work in the system, now more people understand the possibilities, so more users get more out of Marketo. And more teams can do their jobs better. We are smarter and able to be more creative in all our campaigns such as testing campaigns ad hoc and quickly iterating. Because it is now so much easier to onboard new users to Marketo, we can get so much more out of it, and it has changed our thinking entirely. This is what is going to help us to scale and grow."*

Expanded sales deal size with more cross-sell and upsell opportunities

The improvements in the lead lifecycle engine allowed HelloSign's marketing and sales teams to identify new cross-sell and upsell opportunities. Davis adds, *"The results of more effective lead scoring were not only an increase in total number of leads but also larger deal sizes. With better reporting and alignment with sales, we have been able to deliver the information that sales needs so they can identify specific targets to grow the business even more. This increased our overall conversion rates as well."*

Established marketing automation structure that enabled a new thought leadership program

A strategic initiative that is critical to the growth of HelloSign is the thought leadership program for the enterprise, Digital Strength. The success of this yearlong program depends on HelloSign's ability to siphon off these leads into its own path so it can be nurtured separately from other demand generation programs. *"Digital Pi helped us be true to this initiative and set us up with a structure that was both self-service and scalable. It also helped establish HelloSign as a market leader of digital transformation. Prior to this project with Digital Pi, it simply would not have been possible. The result is that in our first week alone, we handled over 500 new people on launch day and in less than one week grew to more than 1,200 registrants with roughly 10% of them from enterprise logo-ed companies. We have a true platform for growth!"*

WHY DIGITAL PI?

For HelloSign, the breadth of experience that Digital Pi brought to the table set it apart. From the best practices of the Digital Pi Gold Standard to the expertise Digital Pi gave to establish an effective executive level reporting strategy, HelloSign saw Digital Pi as a true partner in the success of this marketing automation project. *"This was a fast project, and Digital Pi did not miss a beat! There was an executive level of trust and comfort with Digital Pi. They felt like a partner the entire way, offering amazing insights and a focus on completion. They coached us on what was important for success, and it felt like when we win, they win."*

ABOUT DIGITAL PI

Digital Pi, a leading Marketo consulting agency, helps companies get more from their investment in Marketo. We enable Marketo customers of any size to drive great marketing results every time. Using our Gold Standard framework, customers achieve success in less time on a solid foundation that adapts to changing business requirements.

digitalPI™

844.887.2669
1717 McKinney Ave. Ste. 700
Dallas, TX 75202
info@digitalpi.com
digitalpi.com

Marketo PLATINUM PARTNER