xyz + abc Data Review

Nathan Sagett with abc
Recorded on May 29, 2024 via Zoom, 1h 1m

Participants

xyz
Nathan Sagett, Senior Commercial Account Executive
Andy Seidel, Solutions Consultant
Sanket Shah, Solutions Consultant
Paige Federman, Senior Manager, Commercial Sales

abc
Matt Hodges
Brian Donahue, Sr Director of Sales

Transcript

0:01 | Nathan
what's up Andy?

0:02 | Brian
Not much.

0:03 | Andy
Do you know?

0:06 | Nathan
Do I?

0:08 | Andy
I guess you, do, you don't know… but not much. How much is up? Hi, page.

0:15 | Paige
Hi, how are you? How's everyone?

0:20 | Andy
Doing great.

0:21 | Sanket
All good.

0:22 | Nathan
Doing well?

0:23 | Matt
Yeah.

0:50 | Brian
Hey, guys, or, hey, everyone.

0:53 | Nathan
What's going on? Brian? How are you?

0:57 | Brian
I'm good. How are you?

1:00 | Matt
I can't complain. It's.

1:01 | Nathan
already Wednesday, short week, although it feels like I've got a week's worth of meetings scheduled today. I don't know if it's the same for you?

1:08 | Brian
Yeah, that's have course. Yeah.

1:13 | Nathan
Yeah, I won't complain. Did you have a good holiday weekend?

1:19 | Brian
I did, it was, I thought it was gonna be low key, but ended up being a little bit busier than expected, but all good. How about you?

1:28 | Andy
Yeah, I can't complain. Can't.

1:29 | Nathan
I complain. It's pretty like egrigeously hot at this time of year in Florida. It's like feels like it's in the hundreds.

1:36 | Andy

Just trying to state.
1:38 | Nathan
Say in the AC, I'm actually headed back to Chicago, in a week and a half just to spend a few weeks with the family. So, looking forward to like moderate weather but can't complain. It's going on Matt, fresh hair cut.

1:58 | Matt
Bear Chase. Yeah, I just busted it all back.

2:03 | Brian
I noticed that in my call earlier, I was looking friendly.

2:06 | Matt
Yeah. Well, I don't know if I'm looking fresh. I got the three day old, five o'clock shower now is five o'clock shadow now, but, yeah.

2:15 | Nathan
There you go.

2:16 | Matt
Any way?

2:17 | Nathan
How was your, how was your long weekend?

2:21 | Matt
Good. I could have used more of it, but, you know, back to the ground yep.

2:27 | Nathan
Hear you. I hear you. Well, cool. I appreciate you guys jumping on here again. I know we grabbed an hour today, Matt, Brian, that's still work for you both. Perfect. As far as like what I was planning on uncovering on today's conversation. I really want to make sure that you get the most out of the call, and that's to make sure that you feel confident that xyz can not only help get you the contact information within the target account list that you sent. And by the way, Matt, thank you for sending all of that through. We're gonna be validating that through a contact data test, but also tell you like of the target accounts that you can potentially sell to like actively shopping for abc. And we're gonna be doing that is validating that through the intent data test. So, the actual first and third party data we've been collecting like just to reiterate like again the reason that we're collecting both. Obviously we want to validate our credibility on the contact coverage. But what's really more important is gonna be knowing like of the people that we know, like who should we be reaching out to based on the intent that they're showing? So again, you know, I've met with, you know, Andy Paige and Sanket to like review this data. I'm really confident that with what we've collected, we're gonna be able to track significantly more

impactful data than what you have today. And obviously you'll see that in just a few minutes, but, you know.

3:47 | Sanket
Brian, I.

3:47 | Nathan
Guess I'll start with you. Like what else beyond, you know, validating those two points as far as the data tests, do you need to see in order to feel confident in xyz?

3:58 | Brian
No, I think that'd be a good start. I'm sure I'll have questions, as we get into it, but would just like to see what you had planned here.

4:07 | Nathan
Got it. Matt. What about you?

4:11 | Matt
Yeah. I mean, I think I devils in the details on the data and, you know, being able to see kind of everything… from both sides would be helpful because, you know, I think a lot of the value and what you bring is how they work together, so.

4:29 | Nathan
Yeah. And, and by both sides, do you, are you referencing like the content? Okay, great. Well, let's make sure at the end of the call, you know, we revisit how well we were able to accomplish this on goal. But, you know, in the meantime, I think as far as an agenda, we're gonna start with the contact data tests like, you know, how are you able to capture your data? Which with Sanket will walk you through from there, we'll pass it to Andy to talk through the intent data. You know, we've been able to capture how first Brian, your sales team will be able to action it. And, and then Matt, how you would be able to action it from the marketing workflows. That sounds good. Sweet. Without further, do I'll hand it over to sank to start to review some of that data we've collected? A?

5:10 | Sanket
Sure. Thank you, Nate. Hi, Brian. Hi, Matt. I'm your is specialist in at and I'll be owning anything and everything related to data test, a test, et cetera. So feel free to go ahead and ask any questions. Should you have let me quickly share my screen?

5:31 | Sanket
Okay. And you guys able to see my screen? Perfect. Thanks, right? So just a quick background in terms of the coverage or the entire like a length and breadth of the data that we have here at xyz. Especially when we talk about revenue for sales, in terms of people profiles, we got more than 440,000,000 plus profiles. And this is again spread across 200 plus countries. In terms of

phormographic data or account data, we've got 70,000,000 plus companies. Again, this is also across 200 plus countries. And this data when we talk about phormo graphics as well as say people information or contact data is refreshed every 30 days quickly moving forward. Now for the parameters, what we did is like we used the account list that match that across. And we also use the personal say list that you would want us to go ahead and take a look at like what we have, if you go ahead and say match the accounts and then what we have with six sense revenue database. So one, we uploaded the list of accounts using sales intelligence again, list management. And then we added, we laid in filters. Like there were two iterations. One, we did the exact title match a second, we use the job function as well as seniority filters. And I put both those numbers out so you can go in and have a look at it. And then we've also provided breakdown in terms of e-mail confidence bands, and then availability or phone numbers, direct dials, et cetera. So in terms of the accounts, the total number of accounts that were provided by Matt were 1,137 out of which we were able to go to match 1,085 total unmatched means 52. So when we talk about our own database, this is a total of 95 point four two percent. In my opinion, this is like a Strong number. But yeah, I just want to go in and have your initial thoughts on this match rate, Matt, Brian?

7:32 | Matt
Yeah, I mean, I think, you know, what would rest, what's the data underneath those accounts is the, I think, the valuable thing, to understand for us. But I mean at face value, you get pretty good parody at least with the organizations, which is good.

7:50 | Brian
Now, where did you, where did the list come from? Or I guess it, was it health systems? Was it individual hospitals, or what did that look like?

7:59 | Matt
I used INS as a reference point. Yeah.

8:06 | Sanket
Moving forward now, within these accounts, these are the numbers that we're looking at now, job function and seniority. This is one way to go ahead and look at it. So again, this will remain starting in terms of like total number of accounts. So one zero eight five. Now within these one zero eight five accounts, the total profiles available across different job functions are across the board is three point 5,000,000 and then very specific to the icp's or the personas that matter to you. Again using job function and layering in seniority, which is like a high decision makers, which is say VP directors and C level be able to go and see 97 point four K that's the total icp profiles. And within those 97 point four K, the number of profiles wherein we have a short e-mail is 72 point nine nine K. Now, I would like to quickly call this out. We have a delta over because we do real time API calls with our data partners to go. And like say prioritize those accounts wherein we don't have emails for real time. So within five, 10 seconds, you can go ahead and expect to find e-mail addresses or whatever delta we are having over here. But for now 72 point nine K is wherein we have like a Shaw short e-mail and further this 72 point nine K is split across different e-mail grades. So e-mail grade a plus we have 18 point seven K. When when

you say a plus, it's with the maximum accuracy close to 95 percent accuracy. E-mail grade a is in between 85 through 95 percent accuracy in 27 point two K. So if we just talk about like say high e-mail confidence. So it's like a plus and a. So you can go ahead and like add these numbers close to 50 K is what we have e-mail if it's 26 point nine K. So this is what like 20 percent bounce rate or with 80 percent accuracy. So that's 26 point nine K over there direct dials count. We have 82 point nine K. Now direct dials. These are like direct in dials, a mobile numbers, phone like phone numbers or say work for numbers. This say where I mentioned as work phone numbers, you will also have an extension. So you wouldn't have to go and talk to a gatekeeper. So this is completely separate from the switchboard, a switchboard, lines, or corporate lines which comes by default for each an account that we have. So 82 point nine K on direct dials, and then profiles with both an e-mail as well as phone numbers, we have 65 point seven K. And I also mentioned like we, that we use job function and seniority for this particular criteria. Any initial thoughts, any questions on the numbers that we're looking on the street?

10:32 | Matt
Can you just?

10:33 | Brian
Talk to so, that delta between the 72 and the 97, you said… there's a way to just grab those emails that they're not currently in there or? Okay?

10:44 | Sanket
It's only very limited. It like say, for example, for us to go and purchase the data, right? So we would, we wouldn't have the entire universe of database. So we'll just have like a limited for which is in this case is 70 72 point nine K. But then whatever is a delta, we'll try to go and do real time API calls with our data partners. It may or may not work. But then most of the times I've seen like around 50 percent of times you get a result, either it's an e-mail or phone number, whatever data you call for, and that's absolutely immediately. So like five, 10 seconds. And then you can go and export it. So that's the reason. So, we try to go and prioritize those particular profiles because you're clicking on export and you would want that particular profile to be shown. So that's how we prioritize… that is an answer.

11:31 | Brian
It does. And, and when we're exporting, we can export just those accounts that have emails. And, can we filter that by the grid?

11:40 | Sanket
Absolutely. Yes. So, you can like say further add in like e-mail confidence and then select a plus a and B. So then whatever universe is pulled in front of you, that will have a show short e-mail and I'll tell you how visually it looks like. So say, for example, if you've added the company list, job function, seniority. This is just a snippet now over your e-mail and phone, you can just go to an add e-mail confidence grades and then start like our recommendation is to start with a plus and then a and then if need be come to be. But if you select a plus a and B. So whatever

universe is pulled on your right, you'll be able to see all the profiles that has a show short e-mail Brian. And the reason we have the e-mail confidence bands over there is because again, I said like we refresh our data every 30 days. So whatever you see in today with every subsequent run, it moves to like a and then a plus. So that's the reason we have that those bands in there as well. Now, the second way we looked at was having exact job phrases or job titles. Again, this would remain static. One zero eight five and three point 5,000,000 total is profiles. If you talk about exact job title is 19 point two K. And then number of profiles with emails is 14 point two K of those 19 point two. Okay. Again, for the split by e-mail grade a plus three point eight K, e-mail grade a is five point nine K e-mail grade B is four point five K. Direct dials count is 16 point four K and profiles with both emails and phone numbers is 12 point seven K. If we talk about just exact specific job titles… any questions on this, Brian, Matt?

13:22 | Brian
Is there a limit on exact job titles that we can put in now?

13:26 | Sanket
Zero limit. You can put in as many as possible. So this is just one snippet that I have pulled what I did so you can go about with it.

13:33 | Matt
Brian, you can see the full list of what I gave them in that spreadsheet? I just shot to you in slack. There's a tab that says job titles. So I mean, is it was fairly expansive for, you know, a quick run at it?

13:49 | Brian
Yeah, yeah. I just.

13:50 | Matt
Thinking.

13:51 | Brian
Vp of ambulatory, could be vice President of ambulatory. Like there's just a lot of different variations there that we, yeah… okay, cool.

14:05 | Sanket
So, yeah, these are the numbers I'll share across what you pose the call. So you'll have the numbers readily available. But any further questions or any initial thoughts with the numbers, what we're looking at?

14:20 | Nathan
A Brian who ran a similar test with Zoom info. No, not yet. Okay. Obviously, these numbers make a little bit more sense, when compared to another dataset. So making sure that like you're obviously looking at this as far as what another vendor is providing to help you feel confident.

But I guess like how does this look against your initial expectations?

14:52 | Brian
I think it's gonna just, we needed to see what those contacts actually are to have a Evaluation. I think numbers are helpful, but, you know, who we're actually getting there and how that maps to the marketing side of things I think is what I'm interested in now.

15:13 | Andy
Okay. So I guess ideally we can run that exact same task. I mean, it's never gonna be perfect, but you can try to pull the exact same numbers with Zoominfo the way we did. So that you're getting is close to apples. You know, our hope is that you'll come back and say, yeah, pretty much the same quantity across both vendors. Maybe maybe even xyz is higher. But Brian, I'm curious, how in your mind would you like to validate? Like what are those contexts actually look like? What are you hoping to see? And how can we support that?

15:46 | Brian
So, were you planning to show the other side of it that is kind of, the intent data? Yeah, as part of this, yeah.

15:55 | Andy
Yeah, that's what we're headed next. Okay?

15:57 | Brian
Okay. Maybe I want to get there before we actually dig into a couple of specific accounts I think, you know, to make sure that we're seeing both sides of it. And then, you know, pulling up maybe an account or two and looking through that would be most helpful.

16:10 | Andy
Yeah, absolutely. And we'll continue with our agenda to go into like the intent side, what does this look like in the platform? What's the workflow? What does activation look like across marketing is sale? And then typically, what we do to validate quantity, sorry quality is like we can share sample data sets. And then the thing that we don't love to do but we will if you really want is again that just like, hey, let's pick some stuff one off and, you know, hopefully the account you choose are the titles we pick are there. But if we can test as much as possible, it's always throughout we want to go. Okay. Perfect. All right. Have I appropriately shared discovery xyz, sales intelligence, Nate. Okay. So what I'm what I've pulled up here for this is actually your instance of xyz. So you can see we're at abc health that sales. This would be the application that your sales team has access to. This is exactly what they would see right now. I'm showing it to you in just the standalone chrome application. Do want to call out again that we can put this directly into your Salesforce. So that if you want to keep them in the same tool, they can do that… because we're not integrated with your Salesforce, you'll notice, I can't look at dashboards. Yeah. What's up?

17:30 | Matt
When you say integrated into Salesforce, is that in through like… I'm gonna say an I frame but it's probably the inappropriate thing that's it. Definitely. Okay. All right. Well, a lot of people, you know, frown upon iframe references at one point in time. But yeah, been good. So it's not like a
full mapping of the data over it's. It's literally like, you pull up an account and it's xyz in, a web view, I guess so.

18:02 | Andy
Up my Salesforce, just so you can see… you know, my gosh, Salesforce. I don't want to know what's new, all right. So if I'm a seller, what we don't have configured for you all today is your reps will all have a xyz dashboard where we take all of their named accounts and we prioritize them based on the intent data. So, you know, you can see that this BDR I'm not a rep, but this BDR has, you know, almost 100 accounts over 100 accounts, 80 are cold, 27 are warm, 14 are hot and five are brand new hot today. And so I'm gonna start my morning with morning brew with my coffee and this is my top hot account and I can dig in. So this is what we show here. But then on the account contact and lead objects, if I just show you an account example here's, that I frame. I'm fine. Saying I frame on, tell me if that's not working for me. But here's, the.

18:59 | Matt
No, it's fine. Right. Yeah. We web view is another one, that is the new generation of the iframe. I feel like.

19:06 | Andy
Okay. Yeah. I say I frame that's what we say. So anyway, that's the integrations that give you a good idea there. I probably over answered that question.

19:16 | Matt
No, I mean, I think, you exactly answered it. It's great, appreciate it.

19:21 | Andy
Very good. Thanks and feedback. All right. So here we are.

19:25 | Brian
Sorry, just going back to that. Is that where you would see contact information as well? Or would that be, would that be like a, the other integration I was talking about?

19:38 | Andy
Yeah. So we also, whenever you acquire contact information from us, it's a two step process and you can choose how to configure this step one is unlock it and unlocking means that we'll show you the phone number of the e-mail within our product. Step two is if you want, we can add that to your CRM to your Salesforce and you can set up a mapping profile to say, hey, when

reps unlock these contacts, go ahead and add them to Salesforce and map all the attributes to these fields and making sure that we're keeping things clean and where do you want your data to go?

20:16 | Brian
Got it.
20:17 | Andy
Okay. And I'll be sure to show that too in the app and if you want. I'm always happy to pull up my Salesforce and be really fancy with making sure I'm only showing stuff I can show. But… so what I did here is I uploaded your target account list. So that same list that you shared for the data test. I just put it into the sales platform and then it was about a 1,000 accounts. And then you can see, I put on a couple of filters here. I put on what accounts are hot. And then, I also just wanted to know what accounts are hot, but I want to make sure they've been on your website in the past week and that's these 23 accounts. So across all your reps, we're going to really help hone in on what's your lowest hanging fruit and who's on the website and what do they care about? And how do you build out that buying team? So I'm curious, Brian, are any of these getting you most excited for me to click into?

21:12 | Brian
Can you, there's a couple I think that would, I could see being exciting, for the team? Can you scroll down a bit?

21:29 | Brian
Yeah. Can you, there's two that I might want to look at in a little bit more detail. So, so website visits, you have greater than zero website visits to the abc site. Got it. Okay. And there's and is this map too also what they're searching for as well? Or is I, is this entirely different than that?

21:55 | Andy
And just to be really clear, our keywords are not what they're searching for on google. It's what are they reading about in our publisher network of millions of websites?

22:06 | Brian
Yeah. So this is a, this is a list of both what they've read about, but I guess if they've read about, it would be on the abc website. It could potentially be from the abc website.

22:17 | Andy
Yeah, I can make that. Sorry, Nate, go ahead.

22:20 | Nathan
No, I was just gonna say we delineate what they're doing research on. So if it's coming to your site, if it's happening off of your site through branded and generic keyword that math sent. So I think competitor names, generic keywords more top of the funnel, like just like conceptual challenges that you solve for like we delineate and like distinguish, like which of those are in an

account view. So, and it might make sense just to like show in?

22:44 | Andy
Yeah.

22:45 | Nathan
What, what that looks like?

22:46 | Andy
What do you want to start with? And I think it'll come to life, Brian once?

22:49 | Brian
Yeah. Can you actually do moffat cancer center? Yeah.

22:53 | Andy
So this is a quick view for up. I think I was in a different instance for a second there… that, we're having technical difficulties lists discovery.

23:16 | Matt
It's the dreaded moment, right? Yeah.

23:18 | Andy
Yeah.

23:18 | Matt
I.

23:19 | Andy
ended up happening is I was in two instances which?

23:24 | Brian
Yeah. I'm sure you were.

23:27 | Matt
Brian's, never a, brian's never had a demo, go back, no, never… to at tomorrow.

23:35 | Andy
This is our xyz account. And then sometimes the data gets finicky when I go between ours and abc health.

23:43 | Matt
Yeah, nobody.

23:44 | Andy
Cares. And I making at my SC, excuses while I'm really just stall here to get your instance back up and go into your safe filters, which none of it's popping up. Let's just search moffit. Is it moffit?

23:59 | Brian
All right. Yeah, it, I think to… hang up.
24:08 | Andy
Big money. Okay, perfect. So, this is the full account view. We have some recommended actions based on the data we're picking up, you know, so like, you know, top pages that they're looking at… what's really cool is like focus your effort on people with high intent from these locations. So, moffit's in Tampa, Florida, but look at all these unique cities all in Florida. But what we can do is in one click, we can say we're like let's see everybody from palm harbor, right? We've got seven of Tampa. That makes sense, right? And this is gonna pull up a list of all the contexts we have for this for moffit out of palm harbor, and it's just 19. So, right now, I feel like as a rep, I could probably just scroll through the titles and see if any are relevant to me. But if this list was too big, you can always filter this, you know, based on job title, function, seniority, if we have that e-mail phone number.

25:04 | Nathan
Curious, Brian, is, what does like moffat mean? Is it like an opportunity open opportunity? Is it a target prospect that you're looking to break into?

25:12 | Brian
Yeah, it's an early stage opportunity that I've had personally had a little bit of interaction with. Yeah. So I'd love, to just dive into it a little bit more and there was another one on there. Actually. Yeah, I would love to look at it in a second.

25:28 | Matt
They started, but ata didn't they, I think.

25:32 | Andy
Yeah. So what we can tell you about moffet is that in the past 30 days, they've been researching these branded keywords, and these generic keywords. So they've been reading articles about patient satisfaction 16 times in the past 30 days and specifically from those unique locations, right? They have been reading articles about wheel, potentially, you're a competitor, potentially maybe just the generic Term wheel. We do our best to get that more granular, but from these unique locations. So this is that keyword data which is totally separate from what they've done on your website.

26:13 | Nathan
And Matt, we can continue to work with you to refine the keyword data as you see fit. Like if you

want to get more specific with what we decide to insert here as far as like the actual Term, so that we know that they, they're searching for exactly what we deem and like indicate to be relevant for you. But the purpose is obviously showing that like in which case, like there's a lot of it happening from off, from multiple different locations within Florida.

26:38 | Matt
Yeah, some of them may be looking for new wheels for their car, but yeah, I can.
26:44 | Brian
It's Florida, right? Yeah.

26:49 | Andy
So, like typically, the way we see customers using this keyword data, this is critical for marketing for all of your accounts that aren't on your website instead of just, you know, spray and praying your entire Tam or icp with engagement to try to drive them to your site. This is going to help you say, like what often, what we'll do is we'll run a closed one report. We'll say, okay, let's look at your closed one customers. What keywords were they researching right before they bought it? And you'll we'll typically find a pay pattern. And then what we'll say is, okay, let's look at your prospect, target account list for the accounts that aren't on your website? Who, who's researching those same keywords? And now matt's got a really great list of accounts to run marketing, to drive them to your website. And you can even tailor his content using those keywords to get them there. Once they're on your website, they're at the point where they go to you. Now, this is helping you understand what they care about and how to position in tandem with what web pages they've been on.

27:51 | Paige
A few things that are setting xyz apart here to take a step back. One, we're deanonymizing 30 to 50 percent more accounts than anyone else in market. But we're also having those unlimited branded and generic keywords. So you're able to surface competitors. So if you want to make sure that anyone in your prospect list you want to say, are they looking at any other competitors or specific products that my competitors have? That's gonna, that's gonna set xyz apart that we can have that in an unlimited fashion with brand keywords as well?

28:29 | Matt
Can we go back and look at baptist health? They're interesting, to me, Brian, because, they are a former Bright MD or to be a former Bright MD customer… because Bright and not a business for context for you guys.

28:52 | Matt
And I just want to see kind of like what there?

28:55 | Nathan
So they're a former customer, you said?

28:57 | Matt
Not a former customer of ours. Hopefully soon to be a new customer of ours because, their primary vendor is no longer in business and they've got until august to get off. Which one is that? Again? It was baptist health in Kentucky. I think I saw them on the list somewhere yep. Yeah. So they.

29:14 | Andy
I'll go into the full view. And then as we look at baptist health, I'll start with your website. No surprise from Louisville, three unique visitors. I could see who we have on that level, then you can kind of see some of the top pages that are looking at here. Then as you into the keyword level… this gives an overview of the types of keywords that they're reading content about within our network.

29:45 | Matt
Amazon clinic makes sense. Yeah, you know what, you know, it's funny, Brian, like it's interesting that amazon clinics in there, I number, I put that in as a keyword or not. But it, I must have, if that shows up, we immediately know that they're completely searching for a solution to compete against amazon clinic, which will empower the sales team to sell to that point, which is cool. But.

30:15 | Brian
Yeah… great.

30:20 | Andy
And what's great?

30:21 | Nathan
About, the saved filter, that Andy pulled up is, that was just one way that we can help you distinguish in hot accounts and the ones that have visited your website, there's like a number of different ways. We can like filter out accounts based on your target account list. Like we can do a competitive takeout type of account where you can insert, you know, maybe amazon clinic as a keyword, us to see like which of the accounts in your target account list are researching amazon clinic. And if that's something that's going to be indicative of someone that's you know, likely going to open an opportunity, like maybe they could spend their time there. So there's different ways that you can like prioritize your day in your reps day based on these saved filters that they don't have to create every time that they log in and allow them to. Again, like now that they know who's in market like, all right, let's see who you should be reaching out to based on our ability to say, where are they doing this research from?

31:14 | Brian
Can you click in a Sanford?

31:18 | Andy
Yeah. I was that on that last screen here?

31:20 | Brian
Yeah. So down a little bit right there.

31:25 | Andy
Why am I not? I see it? Okay?
31:30 | Andy
As is tradition, we'll start with website activities… right? Just just one visitor on two pages… on the keyword level quite a bit here.

31:49 | Andy
So, I'm curious, Brian, I wanna make sure we have time to go through persona map and contacts in that phase. But I'm curious your thoughts and feedback on just the intent data that xyz is providing on website and keyword level. And if we've left anything there.

32:12 | Brian
Can you go, can you go back to Matt? I just want to make sure I'm understanding, and you said this is for the past week?

32:22 | Andy
Past 30 days?

32:25 | Brian
Can, can you go?

32:27 | Andy
Well, I'm.

32:27 | Brian
off it again.

32:28 | Andy
The, the website, not 30 days, but.

32:30 | Matt
Yeah. The.

32:31 | Andy
keywords, 30 days?

32:35 | Brian
So, yeah, when I was looking at?

32:38 | Andy
Where's moffat… I'll just pull it up here. Here's. Moffit's keywords?

32:44 | Brian
And when, you showed… the website traffic, it looked like there was one visitor on multiple different. But then originally you showed… was that maybe that was keywords, not top page, not website visits, where there was like a,
33:06 | Matt
we're gonna.

33:07 | Andy
So that's where, you know, hey, we've got this one visitor from Tampa, Florida. On all these pages… you know, you can see probably we find Tampa Florida. And yeah, here's Tampa, Florida on wheel patient satisfaction, Tampa, Florida. So we,

33:23 | Nathan
we'll give that geolocation.

33:28 | Brian
Yeah. Maybe it was a view before this, that showed like more than one unique visitor. And, and I'm guessing that was on key keywords as opposed to web traffic.

33:39 | Andy
Yeah. And so like if you want, I can filter on unique visitors. So these are 23 accounts where you've got at least someone on your website. But if I actually go to unique visitors and I say, you know, over the past month which I don't think we've had the tag up that long greater than one… right? So here are the six accounts where you've got multiple unique visitors hitting your site, and… then.

34:06 | Matt
this is only going.

34:06 | Nathan
To be more impactful data. Obviously as you continue to leverage, like as the tag stays up, you continue to track this data. Like we've only really been tracking data for maybe a two week period of that. So as you can imagine like it's only gonna get more valuable for you to know like when that information was happening. But the purpose again is like regardless if it's like an open opportunity one that, you know, you want to go after like we're gonna surface the ones that are actually in market so that you can prioritize with ones that have the highest likelihood of actually

opening that opportunity?

34:48 | Brian
Can you do me a favor? There's? Like, can you search for a specific account on here? Can you do ecu help? But I.

35:05 | Matt
as an oven or egg?

35:10 | Andy
Thank you. I might have to spell out the full thing. No here it, is that it the domain?
35:15 | Brian
Yeah.

35:16 | Andy
Perfect. So like this is too like that's an account that you're interested in. But xyz is saying it's just a warm account reason being at least in the time we've tagged your website, we've picked up no one from this account there. And then on the intent level little bit shorter of a list of keywords being researched. So just not as much signal here showing that maybe they're worth time. Maybe this would be a prime account for Matt to get into a Display campaign to target key personas and drive them to the website. And in the meantime, sales can really prioritize their time, you know, on that hotter list I had pulled up.

35:54 | Brian
Cool. Can you check one more Houston methodist?

35:58 | Andy
Yep. And then after this one, I do want to make sure we get into marketing.

36:01 | Brian
Yeah, yeah.

36:06 | Matt
Can you drill down to the contacts on Houston? When you look at it, is it possible to go?

36:10 | Andy
Yeah. And so, like last thing I'll show is I do want to make sure to show that contact workflow and what that looks like. So, Houston methodist is a new hot account. They have one unique visitor from salt lake that's you know, we could see actually uphold this up and let that load for a sec. You know, they're on clinical quality keyword side of things, seeing a fair amount of data here. Two ways for you to get to the contact level one is you can click view all people and then filter from there, I clicked, I wanted to see like, hey, who's from salt lake city. So when I click this, that's actually gonna open the same thing, right? So looks like we just have a certified nursing

assistant. I don't think that's a key persona you're going after here. But if I actually just… X this out and we'll open up view all people from Houston methodist, this is gonna give me all the contacts we have from Houston methodist. And then from here, you can filter title and function seniority, if we have their e-mail… what I'll come back to this Brian if you want to click through. But I did just want to show in our xyz instance when we fully integrate with your CRM. And when you give us relevant job titles and functions, we'll create a persona map for you. And so ultimately, your reps are gonna have this kind of a view where they can see functions seniorities, and then actually get a list, of contacts and they can filter by, hey, who's in our CRM, who's not in our CRM? Who do we need to unlock from xyz who have you not exported? So this is just a really nice way of being able to like have that full view of the contacts you own versus this contact xyz could provide and kind of start to put together maybe a holistic view of that buying team. And.

38:05 | Nathan
And why I think this is actually really important, for your business specifically is I know that when you sell the enterprise health care, these are gonna be larger buying committees that are gonna take longer sales cycles. So being able to map the actual committee that's involved in those decisions and like having a view for at least you Brian to see, you know, and you're so invested in some of these larger accounts that you want to make sure that your team is like actually going into like, you can take a look at that view is like, are we hitting the right people at these accounts? So that persona map will allow you to be like kind of holding your Ops accountable in that sense?

38:36 | Matt
How confined is that persona map because you have like marketing in there? And for the most part, I would say they're like a tertiary focus of ours probably after the sales in motion… but the medical officer, chief medical officer would be of interest. So, like, is it just scope to your confined persona map or can we have one that actually supports healthcare?

39:08 | Paige
Is customized for you? So that's what we would help you with an onboarding. But our goal is to be able to use this as a tool to kind of understand, where you might want to unlock some contacts where you might want to get more involved with other departments. But this is our example for what we do.

39:26 | Andy
So that's.

39:26 | Matt
yeah, because, you have healthcare services in there, right? Which I don't know what like everybody in healthcare would probably fall underneath that, which is, I don't know like… maybe dicey. So how can we zero in on all the, yes.

39:43 | Andy
I'm sorry for the delay there. I'm just making sure I could pull this up to show you like, yes to your point map. It's gonna be a little bit more broad on our persona map at first because you're gonna come in, you're gonna tell us the seniorities you want, and then the functions and this is where it's broad. So you'd say, hey, yeah, that's good health services in there. I'll just click two others. Maybe human resources or Operations or administrative, right? It would be good. But then after you enter this in there's another portion in settings where you're going to enter in relevant job titles and this is where you guys can enter. And I know what is a huge list to help pull that in. So that as we give you that full list, it's prioritize based on the relevancy?

40:29 | Andy
All.

40:30 | Matt
right. Brian, do you got other questions, or can we?

40:33 | Brian
No, no, go. What do you want to see Matt? Sorry about that?

40:38 | Matt
Yeah, no, no, this was, it was important. Yeah, I learned a lot from it already.

40:46 | Andy
So I've now flipped over to kind of maths domain here. This is the marketing platform. Again, we're unified on the same data set of accounts, contacts, website visitors, keywords. But now we're just going to focus on the marketing activation. So this is the global view. We've had the tag on your website for like a week, a little over a week and a half. And so we've been able to identify 1,200 accounts visiting your website. And then on the keywords, you can see globally across all our accounts. There's a lot of noise here. I'm gonna filter out in a second, you know, all the hits we're getting and you all can enter an unlimited number of these keywords. There's a lot of cool exercises we can run through. Did those high value keywords, what we call converting high intent? Ultimately, what I wanted to start with today is you all gave us that account list. And so as I open your account list, I want to show you that same view but specific to the accounts you care about. So, you know, 923 accounts in the past week and a half, 28 have been on your website and 706 have researched a keyword. And so now this is where Matt can go ahead and make dynamic audiences to say like, hey, what are the accounts that have never been our website but are researching, you know, xyz abc def keyword put together? Yeah, what's up, Matt?

42:12 | Matt
What if I have? So like we syndicate some content on some digital publishers and we'll get like at people in a week that'll download whatever pieces of content? What sucks about it is, I get

their e-mail address, but I don't have a way that I can advertise to them because I don't have a pixel on them. I don't have any way to retarget them. Can I upload those folks in somehow and say, hey, I want to advertise to these or see if you all can match to them or anything like that or do I just do it from the account level and say, hey, I want, can I build, a, can I build a Retargeting campaign for a case external audience, I guess makes sense? I mean, I.

42:51 | Andy
I.

42:51 | Matt
know.

42:52 | Andy
That you said content syndication, but I'm gonna cover all our bases here. We can only retarget based off of your website. So anything they do on your website, we can retarget the other piece to like. So, so there's that… what we can do is if you know, what account it is which we could actually help with that identification. I can't help, you know, like somebody on another website, we're doing syndication, they download an asset, you get their e-mail… I can't tell you that we can directly target that person. We can't but we can at least know that this account had somebody that downloaded it. And then through a variety of channels, we can dynamically hit them with content that's relevant to what they download it. And we can hone in the targeting. So you're not wasting spend. So that.

43:41 | Matt
Right. So, so what you're saying is I would go and say, hey, like, so I downloaded piece, we know they're interested in that. So I'm gonna go say, I want all these, I'm going to load up and say, I want, these are the companies I want to attack from that syndicated campaign. These are the titles that I want to attack and this is the content I want to, I want to market to them.

44:02 | Andy
Correct. We want to dive into the nuances, but if the highest level is simple as it can be, the answer is yes.

44:08 | Matt
Okay, cool.

44:12 | Andy
Into what that would look like? Me. And my tabs are just a mess, aren't they… here's, like at the high level of, I already kind of got after this here's your 923 accounts in your list here's. The 448 that have never been to your website but are researching five or more keywords here's. The 28 that are on your site. And here's, the seven where there are two or more unique visitors. This is all dynamic. And if you are a customer, you could say, hey, you know, what? For step two of the journey, these are the accounts that downloaded that asset off of another website. We've

tracked, right? And so based off these segments, Matt can dynamically and automatically make sure the accounts as they move through are being sent to the right channel with the right messaging. And then based on the channel, you know, Linkedin has different targeting than our DSP than google, you know, then e-mail.

45:15 | Matt
Cool. All right. So what else should we see here? Because I took you off script.

45:23 | Andy
No, that's okay. I mean that and that really like just to hit it again, this is the absolute core value for marketing is what is your I icp, you're in market icp and the ability to create, you can make as many of these segments as you want. The, the ability to create your buyer's journey. Whether that's three, three stages or 15. We bring in all of the data that you have, whether it's xyz keywords, website, anything from your system to allow you to say, when an account meets these parameters, we're automatically going to hit just the key people on that account with relevant messaging out of a channel that we think is appropriate. And so for you all, you know, like when I think about those accounts that we were talking with Brian about where there's all this keyword research but they're not on your website. I would argue they're not ready yet. Other account sales can focus on rather. I typically tell folks use our DSP right? Serve those accounts, Display ads. And, our DSP is really good at just hitting the right personas with relevant content and then measuring how effective we were at driving them to your website. We're never trying to measure the success of Display typically with like, did it convert to an opportunity or did it influence a form fill? We, we can show that. But typically, it's all about drive in icp web traffic. And then once you've driven that web traffic, you know, maybe you want to get them to click more emails, maybe you want them to download more assets before you hand it to brian's team that's where based on a different segment, maybe you use a different tactic, right? But how do you allocate, your marketing spend? And ultimately, the last thing I wanted to show you was just how do you report on that… at the end of the day? We really want to help you hone in on what campaigns and what channels are most effectively driving pipeline and revenue. And so, say you were to build a report… on your pretend, this is 1,000 accounts, your target account list. If you wanted to measure, hey, how did marketing and sales influence those accounts from december to january? Maybe it's the end of the quarter. We'll show you how many accounts increased engagement, how much new pipeline did you generate? What your total one that you generated? But then we'll break it out and we'll say, hey… you know, a ton of accounts are living under a rock in this segment. You know, you had this many on your website and this many in an opportunity. How did these? Numbers change by the end of the month. And to give a specific example here, we're really excited that we boosted pipeline by 34 percent from december until january. And if we want to know how we did that, we take a look here. So for the accounts in the segment you're analyzing specific to the period of time you're looking at, we can tell you, what were the accounts researching? What were the top ways that you reached them? And most importantly, what were the top tactics that caused engagement? So if it's a xyz campaign, what were the to can an… here's a list of the campaigns? And then we actually can associate those with influence pipeline and revenue by campaign. So as I look at this, I know xyz was really a helpful. We had a 19 percent increase in engagement from the channel xyz. And then

specifically within that channel, I can see what were my most effective campaigns whereas we saw a nine percent dip in Linkedin and I can go ahead and see like which campaign was a flop. Maybe we don't run that next month. So man, I'm curious like… how does this compare with like how you would currently decide where to allocate spend, where to double?

49:28 | Matt
Yeah. I mean the whole reason I've been researching ABM is really to get more precise in what we're doing and we've done some efforts in it again using iq via and their last product but they're not, they're really Strong at position personas and physician leadership, but there's a lot of people in healthcare than our physicians that make decisions. And so… I've been looking for basically something like this. It, it would absolutely make us more Targeted in our approach. So.

50:09 | Matt
That's why I answered it's. E-mail.
50:14 | Nathan
no, I appreciate, that feedback, Matt, I was gonna say the last thing Andy, if you don't mind showing it's like kind of where these two marry each other, where obviously everything that Andy showed in the marketing side of the platform is gonna be how Matt is gonna action the same level of, you know, the same data set. But eventually push that a push those accounts to brian's team. So Brian, if you take a look here like this is a daily alert, that you can set up. So anytime an account hits a specific criteria and, you know, in any of those segments?

50:43 | Andy
Your team?

50:44 | Nathan
Gets this alert every day when they like wake up, and this is an e-mail that, they get sent. So I have this alert that sends me every time one of my target accounts, you know, engages with the xyz brand, whether it's on our site or off of our site. And this is how you can start your day.

51:04 | Matt
Brian, I know we're just likely getting into the point where we're looking at state territories sometime next week. But like this is going to run off of Salesforce Targeted accounts, right? That's where the data is gonna come from. We would have to pre populate all of those right now. I don't know that we've got every ID in representative, for example or sub hospital in Salesforce. So we'd have some data clean up in order to make that aspect work. But, I think we're heading in that direction based on what I'm hearing about territories. Would you say that's true?

51:44 | Brian
Yeah, yeah. For sure.

51:46 | Matt

Okay.

51:48 | Nathan
Awesome. And I mean, assuming obviously like you to move forward like that's something that, our customer success team can help you in terms of setting, those daily alerts up with those segments. But with that, you know, taking a pause here, Brian, I'll start, you know, on your end to know at the beginning of the call, we wanted to make sure that like you felt confident, in both sides of the data, right? The contact data and the intent data. I guess, how did we do on that front?

52:16 | Brian
Still on the end front? I mean, that's a tool that I really have not leveraged before. So, you know, I guess I don't have a full understanding of how that compares in the market. I contact stuff. I would like to just dig into a little bit more, and look at an account or two, and I know that kind of that, you know, just throw a random account out there. It's not what you guys like to do. But, I would just like to understand how I would get in there or anyone on our team would get in there and review an account. And, you know, I know that we don't have those persona maps built out, but, we often know who it is that we need to get to. So that's just one thing I'd like to take a little bit of a deeper look at an account or two there.

52:58 | Nathan
Okay. So it's less of just the actual like specific account. It's more of the workflow of how would you actually access it? Because obviously, like with the accounts that we've shown, it's either like some of them are showing a lot of intent, some of them aren't showing a lot of intent. It's more. So the fact that the intent exists is what we're proving here.

53:18 | Brian
Yeah. I think it's both the work for as well as the contact.

53:23 | Nathan
Okay. In addition to that, like what else would you need to see in order to feel confident, in moving forward?

53:40 | Matt
I don't know. I would like to understand kind of what your match rate is on Linkedin? I mean, because, you know, I, if there's a breakdown between the audience that you're sending to Linkedin and what actually serves and stuff like that, if you'll have stats on it, but I guess you are targeting by account less so than the contact. So you.

53:56 | Andy
yeah. So the.

53:57 | Matt

magic.

53:58 | Andy
at the account level is very Strong upper nineties. I mean, sometimes we see 100 percent because we're really just syncing over an account list to Linkedin. And then within Linkedin, you manage the persona level targeting within those accounts in the walled garden that is Linkedin.

54:15 | Matt
Got you. Okay. Looks good to know.

54:22 | Matt
I may have more questions. I mean, I look at it, argue there's no, no, no doubt that it's better than what we're doing right now, but what we're doing right now is pretty limited. So yeah… anything we do closer to this is better.
54:40 | Nathan
Got it. I know that obviously you're evaluating us against like Zoom info based on what you've seen so far. Do you have, a sense of where you're leaning?

54:51 | Matt
I mean, you know, I don't know that it's fair, to them because I haven't like really done a deep dive into theirs but, they limit the scope of like what you can track. I get more with the marketing side of it than you would get with the sales side of it, Brian. But… yeah, they're just differences and nuances. And, I just don't know enough to say like I mean, right now, I just solve more from you than I have from anybody. So you're leader in the clubhouse because I know more… but, you know, we were talking with tech target, you know, a while ago when we were just starting to do research on this. So, I wouldn't need to go back and revisit conversations with them too. Okay, give you an inadequate answer to that. So.

55:43 | Nathan
Got it. Is there like a specific timeline in which you're looking to?

55:46 | Matt
Some, yeah, I, Brian wants to move quick. I want to move quick but, you know, it more directly impacts him and I want to make sure we're making the right decision so that one side is not negatively impacting the other two, three months down the road. So that's my goal. Okay?

56:08 | Nathan
I know Brian, you mentioned like spending a little bit more time walking through some of those workflows of those sales workflows, that you would want to see that we can help tee it up. I think part of the reason we're obviously like positioning all of this, and you know, making sure that we're getting all of this data in front of you is because we're not shying away from it, right? Like I think everything is going to be powered by the data that you work off of and making sure that you have the strongest data set in the market is going to allow you to hit those revenue goals

that you have. So from Brian, it's getting into those opportunities, quickly beating your competitors into those deals. And then Matt, it's more effectively running those campaigns. Like we're putting our data in front of you to validate that this is going to be like the right decision for you. You know, I'm thinking Brian, that we could probably do, you know, grab some time. I know it's already one day of this week to talk through kind of the rest of your Evaluation criteria, knowing that you're looking to move forward fairly quickly. And then Matt, we can obviously work together as well and making sure that we're aligning, on a timeline that gets you what you need while we also making sure Brian get his decision quickly. One of the things Brian, obviously, I don't want to create fake urgency for you, but like, you know, my goal is we make sure we check off and cross off the necessary boxes, that, you know, we've outlined before, you know, we work towards a proposal. But like given budget is top of mind like, as we work towards putting that proposal together, like does it make sense for us to put an incentivized proposal together, for June and moving forward by then?

57:39 | Matt
By June? Like as in by the end of this week?

57:41 | Nathan
No. Sorry. In the month of June.

57:44 | Matt
Gotcha. Yeah.

57:48 | Nathan
More of a question directed towards you.

57:52 | Brian
I think that's something that, and I can talk about with regard to what that timeline looks like. We probably will just want to sync on it. I would say yes, but again, this has to be a right decision for all parties here. So… and I can sync on that. I mean, I don't know who would want to be on that call but I can make some time this week to just make sure that I'm comfortable with kind of a dive into an account and what those workflows look like and how to manipulate, and create those maps and whatnot. Yeah.

58:32 | Nathan
I'm going to schedule something, for later this week, if Andy, we could probably be on that, just the two of us not to volunteer you. But looking at… Thursday Friday this week, it's like Friday morning is fairly available for us any time between like 10 30 eastern to one easter.

59:00 | Brian
Let's go. Yeah, I can do Friday, let's do Friday. Can you do 12 30 on the water side of that?

59:12 | Sanket

Yes, I can do 12.

59:13 | Nathan
We'll only have 30 minutes. Is there any availability before that?

59:18 | Brian
Yeah, I'm gonna be just in row. I can do 12 works as well. Okay?

59:24 | Nathan
Cool. In which case, we'll plan, to do a deeper dive. And then Matt, we can sync up likely early next week in order to make sure that we're hitting crossing off the boxes on your side too. So cool. I'll send that invite over. I'll shoot a follow up after this, but appreciate both of your time. I know we're at the hour here. So promise I let you out and we'll chat her soon, cool.

59:44 | Brian
Likewise, are you gonna share, you gonna share those numbers, that you walk through at the start?

59:50 | Nathan
Absolutely. Thanks guys to be.

59:53 | Matt
Yeah. Anything you can shoot over that's digest that you think is a value, definitely do it. So, yeah, Brian here, gonna have to build an easy way to disseminate this information uphill. So, yeah.

1:00:04 | Nathan
Yeah, we'll make sure we're here to support you. Obviously, we help build these business cases all the time. So we've got templates all that we can help work off it for you. Cool. Awesome. Thanks so much guys.

1:00:16 | Andy
Okay.

1:00:17 | Matt
Thanks.

1:00:17 | Sanket
Thanks, Steve byebye.