

# Demand Gen Q3 1:1 & 1:M ABM Campaign (Proposed)

June 16, 2022  
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NORAM Demand Gen

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## Objective

Target top 50/100 intent accounts (per product line), known & Unknown contacts, to talk to them about their current finance stack and processes. At the end of the discovery, the Rep/BDR will have a meeting, showing present state → Future state analysis, along with next steps.

- \$75 eGiftCard to have Discovery Meeting
- Some Nicer Gift at the end of the presentation

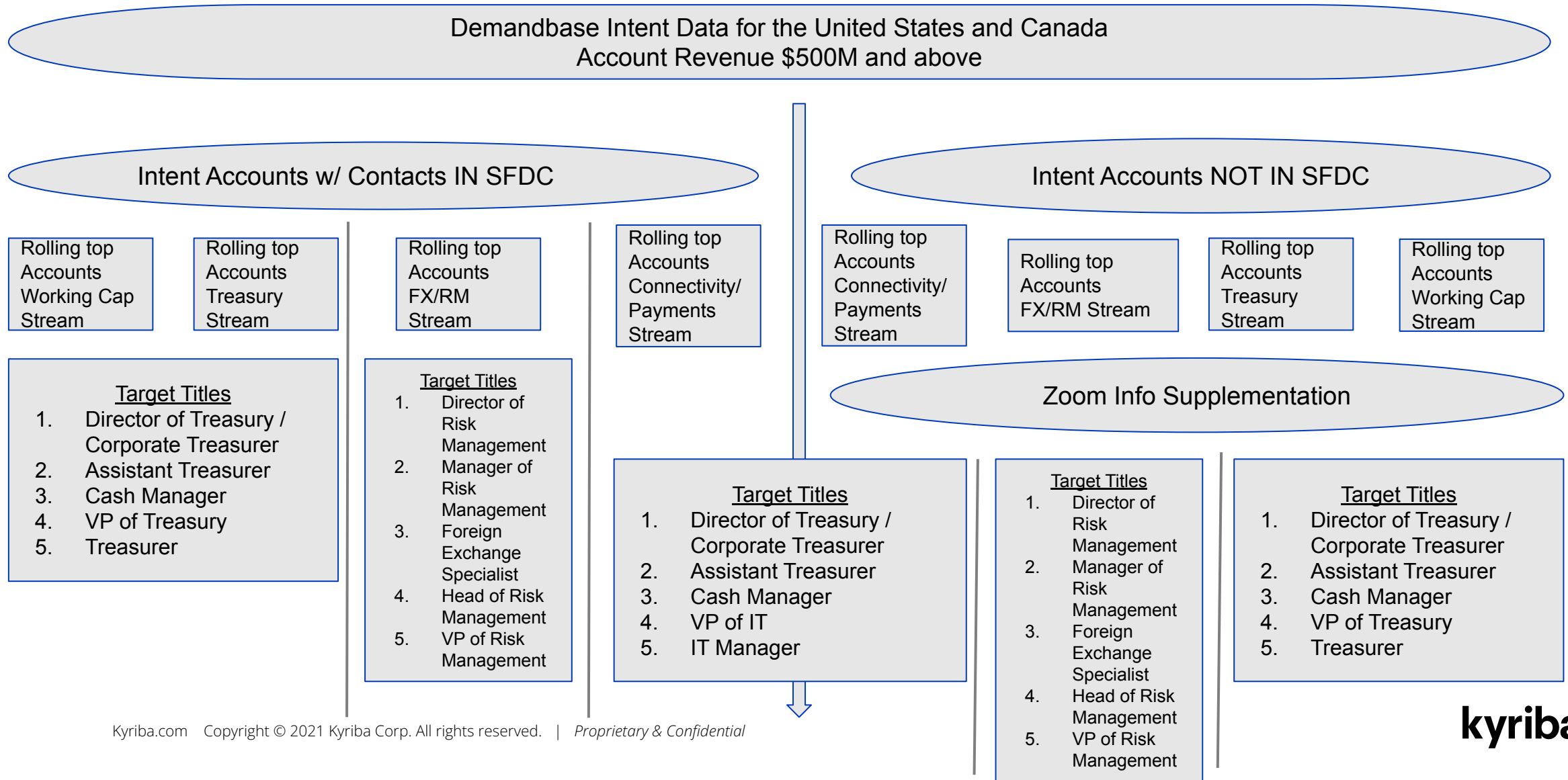
# Messaging

(1 GENERAL; 4 STREAM Driven)

1. Complimentary Finance Technology Analysis (GENERAL)
  - a. Meet with our experts for your comprehensive finance technology analysis and receive a \$75 Gift Card
  - b. Schedule a Meeting
2. Treasury Technology Efficiency Analysis (STREAM)
  - a. Meet with our experts for your efficiency analysis and receive a \$75 Gift Card
  - b. Schedule a Meeting
3. Optimizing Working Capital in the Current Environment (STREAM)
  - a. Receive Expert analysis on optimizing working capital for today's interest rate & economic environment AND a \$75 Gift Card
  - b. Schedule a Meeting
4. Optimizing FX Risk in the Current Environment (STREAM)
  - a. Receive Expert analysis on optimizing your FX Value At Risk (VAR) in today's interest rate & economic environment AND a \$75 Gift Card
  - b. Schedule a Meeting
5. Optimize Payments & Bank Connectivity for the Future (STREAM)
  - a. Receive expert analysis on optimizing your payments and bank connectivity AND a \$75 Gift Card
  - b. Schedule a Meeting

# Segmentation

Using Intent Data to target top 50/100 highest intent accounts for both known accounts + contacts as well as unknown accounts



# Output

*PDF of Current State vs Future State Analysis; 4-6 pages*

- During the calls with the Client BDRs explore the systems, connectivity, system dependencies and processes of the prospect in a broad manner; drilling down INTENT-STREAM that they fall in. Gaining a deep understanding of prospects current operating environment.
- Architect a future state diagram utilizing Kyriba Tech Stack including any statistics in efficiency improvement from Value Engineering.

# Output (cont. sample)

## *PDF of Current State vs Future State Analysis; 4-6 pages Using Current Kyriba Slide Deck*

Slide 1 Cover Slide

Title:

COMPANY [Finance or  
STREAM] Technology

Analysis: Current vs Future  
State

Slide 2 Preface. Intro.

Background

Short note on what they are  
about to see. How we arrived  
to our analysis. Do not talk  
about kyriba, yet. add cool  
graphic.

Slide 3 Current State Analysis

Illustrate their current state.

Highlight efficiency loses,  
provide light commentary.

Slide 4 Future State Analysis

Illustrate their future state with  
KYRIBA technology. Highlight  
efficiency gains (leverage stats  
from VE) provide light  
commentary.

Slide 5

Kyriba Overview. Client  
references where applicable.  
Awards. 50/50 - Text/Graphics

Slide 6

Closing slide. Suggested Next  
Steps. BDR Contact Info.

## Tech Stack

1. Salesforce
2. Salesloft
3. Demandbase
4. Sendoso
5. Mutiny (?)
6. Pardot (?)
7. Data Studio (ABM Dashboard)(?)

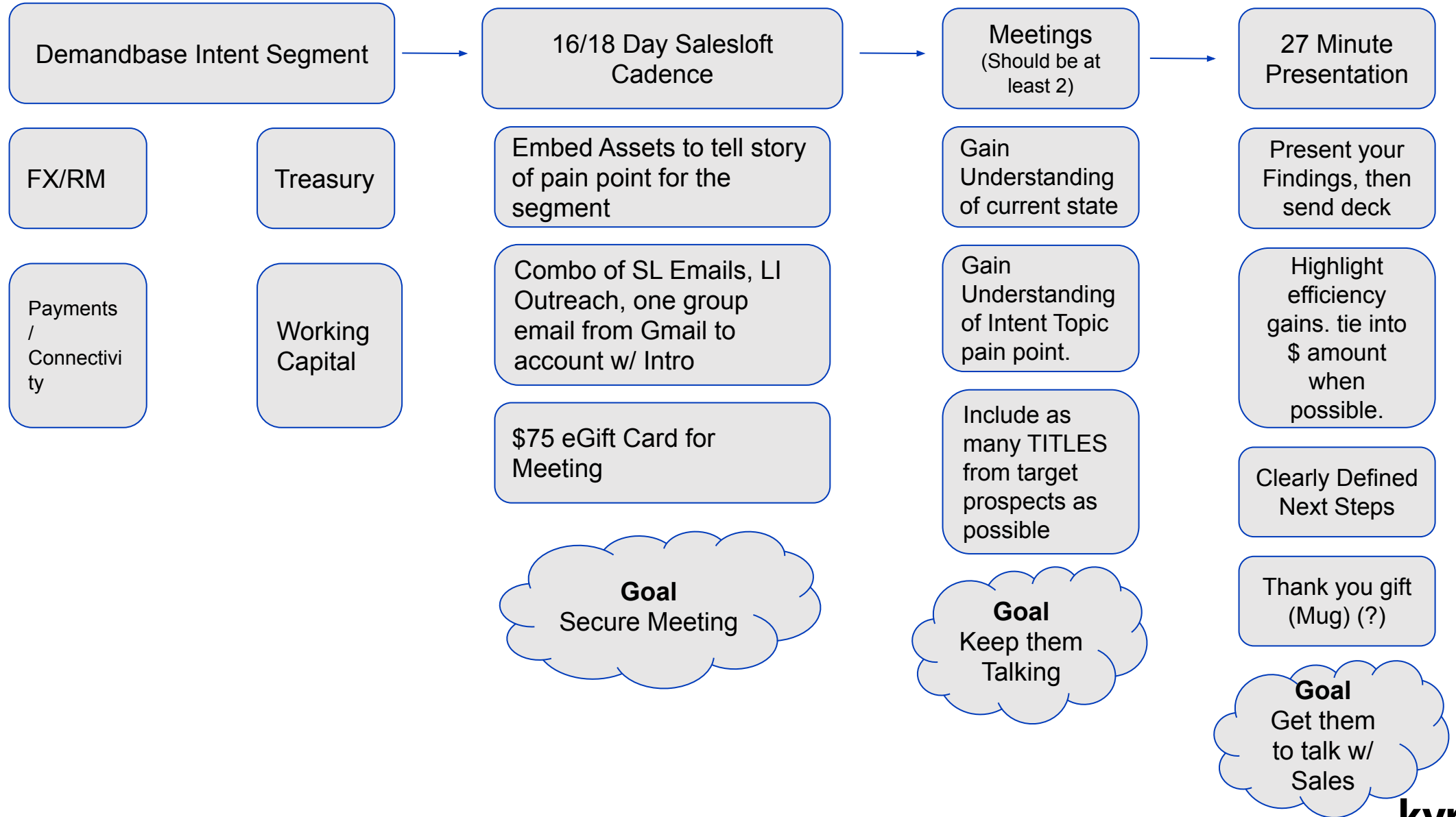
## Teams

1. NORAM DemandGen
2. NORAM Value Engineering
3. NORAM BDR Team
4. Marketing Ops

## Assets

1. One eBook for each stream vertical
2. One Blog for each stream vertical.
3. One webinar w/ Trailer and Moments for each stream vertical
4. 4 Salesloft Cadences
5. 4 Custom Pardot LPs (?)
6. gSlide Template
7. Call script / questions
8. VE Efficiency Statistics

# Flow





# Execution Timeline - Monthly Cadence

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Week 1	<div>Start Known Contacts and Accounts Cadence in SalesLoft Day 1</div>	<div>Day 3</div>	<div>Day 4</div>	<div>Day 5</div>		
Week 2	<div>Day 8</div>			<div>Day 11</div>		
Week 3	<div>Day 13</div>		<div>End Known Contacts and Accounts Cadence in SalesLoft Day 15</div>			
Week 4						

# KPIs

Salesloft	Sendoso	SFDC	Parmonic / Video / Content
1. Email Open Rate (#) 2. Email Response Rate (#) 3. Meeting Set Rate (#) 4. Open to Response to Meeting Ratio (#)	1. Gift Card Sent (#) 2. Gift Cards Redeemed (#) 3. Total Gift Card Spend (\$)	1. Net New Logos (#) 2. Net New Revenue (\$) 3. Multi-Touch Revenue(\$) 4. Output Sent to Proposal Sent Ratio (#)	1. Webinars Viewed (#) 2. Moments Viewed (#) 3. eBooks DLed (#)

# Cadence + Content Documentation

# Working Capital Cadence

Length: 15 Working Days

Channels: Email (SalesLoft), Email (Gmail), LinkedIn, LinkedIn InMail, Phone

## WEEK 1

Day 1 (Monday Preferred) - Email 1 (SalesLoft)

Day 3 (Wednesday Preferred) - Connect on LinkedIn

Day 4/5 - (Thursday - Friday Preferred) - Email 2 (Gmail) "Weekend Reads" - Send w/ \$10 to Starbucks

## Week 2

Day 8 - (Monday Preferred) - ~~Phone Call "What did you think of the weekend reads"~~

Day 11 - (Thursday Preferred) - LinkedIn InMail 3 - "We keep missing each other"

## Week 3

Day 13 - (Monday Preferred) - Email 4 (SalesLoft) - "If anything changes in the future don't hesitate to reach out"

Day 15 - (Wednesday Preferred) - ~~Phone Call "One last shot"~~

# Working Capital Copy

Email 1 (SalesLoft)  
Subject: Optimize Working Capital to prepare for recession  
Copy:  
[Greeting],

With constant supply chain disruption, rising currency headwinds and a strong USD, is your current working capital program equipped to handle these challenges?

Sentiment on the street is to begin preparing for an economic contraction, and companies are going to have to do more with less.

For a brief meeting to discuss Working Capital challenges and opportunities, I'll send you a \$50 gift card. How about next week?

[Signature]

Email 2 (Gmail)  
Subject: Re: Optimize Working Capital to prepare for recession  
Copy:  
[Greeting],

It's Friday, which calls for Starbucks. It's on us this week, just click here to redeem your gift card: [LINK].

While you are waiting for your drink, check out for the clip below to learn how to manage your supply chain despite a challenging macroeconomic environment.

[Embed WC Moment]  
[Embed WC Blog]

P.S. The \$50 gift card is still available for a brief meeting with our experts.

[Signature]

**Constants for All Emails:**

1. From: BDR Representing that account.
2. Greeting: Hi [First.Name]
3. Signature: [BDR.Full.Name] [BDR.Email] [BDR.Phone.Number] [Calendar or On-Demand Demo Link]

Theme: Optimizing Working Capital in the Current Environment

Receive Expert analysis on optimizing working capital for today's interest rate & economic environment AND a \$75 Gift Card

CTA: Schedule a Meeting

LinkedIn InMail 3  
Subject: Working Capital discussion?  
Copy:  
[Greeting],

Disruptions in your operations could have a material effect on your earnings. With Supply Chain Finance, Reverse Factoring, Dynamic Discounting and Receivables Finance, you can inject liquidity, optimize payment terms and accelerate cash flow.

Are you available [Time 1] or [Time 2] to discuss your working capital program? \$50 gift card on us for 15 minutes!

[Signature]

Email 4 (SalesLoft)  
Subject: Ball is in your Court  
Copy:

[Greeting],  
I haven't been able connect over the past couple of weeks to discuss how to optimize your working capital program.

My contact information is below should anything change on your end. Hope to speak with you soon!

In the meantime, see what {intro clip}.

[Embed WC Moment]

[Signature]



# Treasury Cadence

Length: 13 Working Days

Channels: Email (SalesLoft), Email (Gmail), LinkedIn, LinkedIn InMail, Phone

## WEEK 1

Day 1 (Monday Preferred) - Email 1 (SalesLoft)

Day 3 (Wednesday Preferred) - Connect on LinkedIn

Day 4/5 - (Thursday - Friday Preferred) - Email 2 (Gmail) "Weekend Reads" - Send w/ \$10 to Starbucks

## Week 2

Day 8 - (Monday Preferred) - ~~Phone Call "What did you think of the weekend reads"~~

Day 11 - (Thursday Preferred) - LinkedIn InMail 3 - "We keep missing each other"

## Week 3

Day 13 - (Monday Preferred) - Email 4 (SalesLoft) - "If anything changes in the future don't hesitate to reach out"

Day 15 - (Wednesday Preferred) - ~~Phone Call "One last shot"~~

# Treasury Copy

**Constants for All Emails:**

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- 2. Greeting: Hi [First.Name]
- 3. Signature: [BDR.Full.Name] [BDR.Email] [BDR.Phone.Number]  
[Calendar or On-Demand Demo Link]

Treasury Technology Efficiency Analysis (STREAM)

Meet with our experts for your efficiency analysis and receive a \$75 Gift Card

Schedule a Meeting

CTA: Schedule a Meeting

LinkedIn InMail 3

Subject: Treasury process optimization discussion?

Copy:  
[Greeting],

Lack of complete cash visibility could have a material effect on your earnings.

Together, we can discuss which liquidity metrics are the most important to your business and build a plan (on paper) for you to take back to your team.

Are you available [Time 1] or [Time 2] for us to chat? A \$50 gift card on us for 15 minutes!

Email 1 (SalesLoft)  
Subject: Liquidity Leading Indicators to Prepare for a Recession  
Copy:  
[Greeting],

With constant supply chain disruption, rising currency headwinds and a strong USD, are your current treasury processes equipped to report on leading liquidity Indicators in real-time?

Sentiment on the street is to begin preparing for an economic contraction, and companies are going to have to do more with less.

For a brief meeting to discuss leading liquidity indicators challenges and opportunities, I'll send you a \$50 gift card. How about next week?

[Signature]

Email 2 (Gmail)  
Subject: Re: Liquidity Leading Indicators to Prepare for a Recession  
Copy:  
[Greeting],

It's Friday, which calls for Starbucks. It's on us this week, just click here to redeem your gift card: [LINK].

While you are waiting for your drink, check out for the clip below to learn how enhancing your leading liquidity indicators during a challenging macroeconomic environment can improve your cash conversion life cycle

[Embed TRES Moment]  
[Embed TRES Blog]

P.S. The \$50 gift card is still available for a brief meeting with our experts.

[Signature]

Email 4 (SalesLoft)  
Subject: Ball is in your Court  
Copy:

[Greeting],  
I haven't been able connect over the past couple of weeks to learn more about your treasury leading indicators and processes.

My contact information is below should anything change on your end. Hope to speak with you soon!

In the meantime, see what {intro clip}.

[Embed Treasury Moment]

[Signature]

# FX / RM Cadence

Length: 13 Working Days

Channels: Email (SalesLoft), Email (Gmail), LinkedIn, LinkedIn InMail, Phone

## WEEK 1

Day 1 (Monday Preferred) - Email 1 (SalesLoft)

Day 3 (Wednesday Preferred) - Connect on LinkedIn

Day 4/5 - (Thursday - Friday Preferred) - Email 2 (Gmail) "Weekend Reads" - Send w/ \$10 to Starbucks

## Week 2

Day 8 - (Monday Preferred) - ~~Phone Call "What did you think of the weekend reads"~~

Day 11 - (Thursday Preferred) - LinkedIn InMail 3 - "We keep missing each other"

## Week 3

Day 13 - (Monday Preferred) - Email 4 (SalesLoft) - "If anything changes in the future don't hesitate to reach out"

Day 15 - (Wednesday Preferred) - ~~Phone Call "One last shot"~~



# FX/RM Copy

Email 1 (SalesLoft)  
Subject: FX Hedging Costs, Tigers & Bears, Oh My!  
Copy:  
[Greeting],

With the strong USD combined with the recent fed rate hikes, many treasury teams we have been talking with have been increasingly concerned about the increasing cost of FX hedging.

The overall challenges in managing FX hedges is beginning to materially impact earnings.

Sentiment on the street is to begin preparing for an economic contraction, and companies are going to have to do more with less.

For a brief meeting to discuss reducing the EPS impact of FX hedging challenges and opportunities, I'll send you a \$50 gift card. How about next week?

[Signature]

Email 2 (Gmail)  
Subject: FX Hedging Costs, Tigers & Bears, Oh My!  
Copy:  
[Greeting],

It's Friday, which calls for Starbucks. It's on us this week, just click here to redeem your gift card: [LINK].

While you are waiting for your drink, check out for the clip below to learn how enhancing FX hedging with correlated VaR analysis can reduce EPS impact and risk.

[Embed cVaR Moment]  
[Embed FX Blog]

P.S. The \$50 gift card is still available for a brief meeting with our experts.

[Signature]

Email 4 (SalesLoft)  
Subject: Ball is in your Court  
Copy:

[Greeting],  
I haven't been able connect over the past couple of weeks to learn more about your FX hedging indicators and processes.

My contact information is below should anything change on your end. Hope to speak with you soon!

In the meantime, see what {intro clip}.

[Embed FX Moment]

[Signature]

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2. Greeting: Hi [First.Name]
3. Signature: [BDR.Full.Name] [BDR.Email]  
[BDR.Phone.Number] [Calendar or On-Demand Demo Link]

Optimizing FX Risk in the Current Environment (STREAM)

Receive Expert analysis on optimizing your FX Value At Risk (VAR) in today's interest rate & economic environment AND a \$75 Gift Card

Schedule a Meeting

CTA: Schedule a Meeting

LinkedIn InMail 3  
Subject: FX Hedging Scenario optimization discussion?  
Copy:  
[Greeting],

Lack of FX hedging scenario visibility could have a material effect on your earnings.

Together, we can discuss how correlated VaR analysis can improve your FX hedging scenarios and build a plan (on paper) for you to take back to your team.

Are you available [Time 1] or [Time 2] for us to chat? A \$50 gift card on us for 15 minutes!

[Signature]

# Connectivity + Payments Cadence

Length: 13 Working Days

Channels: Email (SalesLoft), Email (Gmail), LinkedIn, LinkedIn InMail, Phone

## WEEK 1

Day 1 (Monday Preferred) - Email 1 (SalesLoft)

Day 3 (Wednesday Preferred) - Connect on LinkedIn

Day 4/5 - (Thursday - Friday Preferred) - Email 2 (Gmail) "Weekend Reads" - Send w/ \$10 to Starbucks

## Week 2

Day 8 - (Monday Preferred) - ~~Phone Call "What did you think of the weekend reads"~~

Day 11 - (Thursday Preferred) - LinkedIn InMail 3 - "We keep missing each other"

## Week 3

Day 13 - (Monday Preferred) - Email 4 (SalesLoft) - "If anything changes in the future don't hesitate to reach out"

Day 15 - (Wednesday Preferred) - ~~Phone Call "One last shot"~~

# Payments + Connectivity Copy

**Constants for All Emails:**

- 1. From: BDR Representing that account.
- 2. Greeting: Hi [First.Name]
- 3. Signature: [BDR.Full.Name] [BDR.Email] [BDR.Phone.Number]  
[Calendar or On-Demand Demo Link]

Theme: Optimize Payments & Bank Connectivity for the Future (STREAM)

Receive expert analysis on optimizing your payments and bank connectivity AND a \$75 Gift Card

CTA: Schedule a Meeting

LinkedIn InMail 3  
Subject: Future Proof Payments and Connectivity discussion?  
Copy:  
[Greeting],

Having the ability to react in real-time to unknown market conditions has its advantages.

Together, we can discuss how we can improve finance reaction time and build a plan (on paper) for you to take back to your team.

Are you available [Time 1] or [Time 2] for us to chat? A \$50 gift card on us for 15 minutes!

[Signature]

Email 1 (SalesLoft)  
Subject: Future Proofing Your Payments and Connectivity  
Copy:  
[Greeting],

With constant supply chain disruption, rising currency headwinds and a strong USD, are your payment and connectivity processes equipped to transact, report and react to turbulent market conditions in real-time?

Sentiment on the street is to begin preparing for an economic contraction, and companies are going to have to do more with less.

For a brief meeting to discuss future proofing your payments payments and connectivity, I'll send you a \$50 gift card. How about next week?

[Signature]

Email 2 (Gmail)  
Subject: Re: Future Proofing Your Payments and Connectivity  
Copy:  
[Greeting],

It's Friday, which calls for Starbucks. It's on us this week, just click here to redeem your gift card: [LINK].

While you are waiting for your drink, check out for the clip below to learn how enhancing your payments and connectivity for the future during a challenging macroeconomic environment can improve your cash conversion life cycle.

[Embed Future-Proof connectivity Moment]  
[Embed payments Blog]

P.S. The \$50 gift card is still available for a brief meeting with our experts.

Email 4 (SalesLoft)  
Subject: Ball is in your Court  
Copy:

[Greeting],  
I haven't been able connect over the past couple of weeks to learn more about your payments and connectivity

My contact information is below should anything change on your end. Hope to speak with you soon!

In the meantime, see what {intro clip}.

[connectivity moment]

[Signature]

Proprietary & Confidential