Relativity Uses Marketo to Implement a Multi-channel, Lifecycle Engagement Strategy Driving Up Lead Quality and Quantity

With over 160,000 users across 40+ countries, Relativity (formerly kCura) is a worldwide leader in e-discovery software. More than 13,000 organizations around the world rely on the company's platform to manage large volumes of data, quickly identify key issues and act on them during litigation, internal investigations, and compliance projects.

Highlights

- Implemented a multi-channel, lifecycle engagement strategy
- Improved integration with Salesforce.com, streamlining lead management
- Faster and more reliable customer communications (from 1 hour to 15 minutes in one case)
- Gained visibility into attribution data to make improved decisions on which channels to promote certain content
- Used Web Personalization to promote training and certification offerings as well as Relativity's annual user conference

INCREASE IN QUALIFIED LEADS	INCREASE IN OPPORTUNITIES	TIME REDUCTION IN GETTING CRITICAL COMMUNICATIONS TO CUSTOMER BASE
↑ 36%	↑ 17%	↑ 75%

> With our previous MA platform, we were unable to effectively drive our multi-channel, lifecycle engagement strategy forward. With Marketo, we have better segmentation, personalization, attribution and visibility into what's working."

Jason Grodsky,
Senior Manager of Digital Marketing

Relativity®

Challenge: Platform inefficiencies create major setbacks

Jason Grodsky, Senior Manager of Digital Marketing, and his team are committed to drive engagement through a strategy of integrated, cross-channel campaigns. Faced with platform inefficiencies with their previous solution and an unreliable Salesforce.com integration, the team needed to find a way to streamline lead management and improve their ability to nurture audiences with the right content throughout their lifecycle.

"Our integration with Salesforce.com was unreliable. Campaign rules would not work or do something different; instead of removing someone from a campaign it would pull them right back in. Sometimes, we would have people sign up for a webinar via a landing page and never receive a confirmation email to attend – this hasn't happened once with Marketo."

In addition, the team also endured setbacks such as frequent defective software updates, long periods of down time that could last up to hours, and email deliverability issues. "The platform would block us from sending emails to contacts if that contact had unsubscribed from a different company also using the same marketing automation solution as us," explains Jason.

Solution: Moving to marketo brings new levels of engagement

Since migrating to Marketo, Relativity has been able to implement a true lifecycle marketing strategy. Previously they had 3-4 stages in their lifecycle; with Marketo, they have 10-12 different stages driving deeper levels of segmentation.

> The integration with Salesforce and Marketo has streamlined our lead management and improved customer lifecycle engagement. The two systems work seamlessly together to read someone's lifecycle status, their persona and what content they have consumed in order to deliver better content or determine when to engage sales"

In addition, by leveraging attribution data in Marketo, Jason and his team can identify which channels are best for driving forward certain content pieces and use this information to make improved decisions on future campaigns. Since implementing this insight, they have increased the number of downloads on certain content pieces by 3x over the past year.

Also driving forward their content strategy is Website Personalization. "Web Personalization has allowed us to create a 1:1 web experience for our web visitors by displaying only the most relevant content based on what we know about each visitor, the type of content they like, and what they want to learn more about"

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"Marketo has completely changed the way we engage with our audience, allowing us to up level our lifecycle marketing and create personalized, multi-channel experiences like never before," Jason explains. Being able to create and edit complex nurture campaigns with ease has allowed the team to improve overall engagement with results to show for. "The very first campaign we ran with Marketo was a webinar, from that campaign alone we saw a 30% growth in registrants" Jason states.

Deeper engagement and a tight Salesforce.com integration has led the marketing team's ability to more accurately and quickly qualify leads for sales. Comparing Q2 this year to Q2 last year, there has been a 36% increase in the number qualified leads and a 17% increase in opportunities", Jason shares.

Additionally, features such as program level cloning and tokens have delivered unanticipated benefits for departments extended beyond marketing. "We are able to easily train other teams on how to use Marketo so that the marketing team doesn't have to play the supporting role and other teams are able to streamline their processes". In fact, since implementation the Service Delivery Team has been able to run all urgent customer communications through their department with Marketo, cutting down the delivery time from 1 hour to 15 minutes.

Moving forward, Relativity is excited to grow and expand their usage of Marketo's extended platform. "One of the reasons we chose Marketo was for their innovation and product roadmap, we are excited to see what is on the horizon for us as we expand our usage".

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