

0:00 | Isabel  
good morning.

0:03 | Glenn  
Hey, how's it going?

0:06 | Isabel  
In my god, we match in now.

0:09 | Glenn  
All right. I know it feels like it's still there. Hi, Allison.

0:19 | Isabel  
How are you? Good morning?

0:21 | Alison  
Good morning. Happy Monday.

0:24 | Isabel  
Happy Monday. And, we were laughing. We both showed up in green. We're still in the saint patrick's spirit apparently.

0:31 | Alison  
Nice.

0:32 | Isabel  
How was your weekend?

0:34 | Alison  
It was pretty good. Although with, you know, elementary school children, it was not wild and crazy by any means.

0:40 | Glenn  
Yeah.

0:41 | Isabel  
Totally. That is fair. That is fair for sure. Well, where are you?

0:46 | Alison  
A a.

0:48 | Isabel  
I'm in los angeles.

0:49 | Glenn  
But I'm actually in Austin.

0:51 | Alison  
Nice. Okay. I am north of Boston.

0:57 | Glenn  
I love.

0:57 | Isabel  
It, so, is it cold there right now?

1:02 | Alison  
I think it's gonna be like 50 today. Okay.

1:07 | Glenn  
Yeah. All too bad.

1:13 | Isabel  
No, it's funny. I, I've lived in new York for six years and just this last year, we're kind of doing half and half, but there's such a difference in like an la 60 and a new York 60. Like the wind in la is just always a little bit chilly in new York. You can like, you know, be outside and be hot all day long. So, yeah, east coast might win in terms of like the good like level weather.

1:39 | Alison  
All right. Cool.

1:40 | Isabel  
Yeah. Cool. Well, awesome to meet you. Super excited to connect with you all for context. I've been here about three years as a BDR so, I've been trying to break into alert media for quite some time. Okay? And I know that our CRO former CMO connected with Alex last Friday.

2:01 | Alison  
Yeah.

2:02 | Isabel  
And we're.

2:03 | Alison  
have you pronounce your cro's name?

2:06 | Isabel  
Latin?

2:07 | Alison

Okay.

2:09 | Isabel

So, we're excited just to kind of get an understanding of where your team is at, and what will be most important for tomorrow's demo because we wanna make sure everyone walks away with that feeling they had the best use of their time. So, would love to just get an understanding. I know you're overseeing Rev Ops of where your team is at what you're really looking to solve, and your familiarity with 6sense as well?

2:36 | Alison

Yeah. I've heard of 6sense. I don't know a ton about it. I believe that... somebody, my colleague John yarborouh had planned to talk to you all in April. And so I think he was planning to engage with you and maybe your more traditional use case related to like ABM and analytics stuff like that. The reason why we sort of put a rush demo on a calendar was because or is because we are about to renew with Zoom info and we use them for... finding target people and then for doing people enrichments as well as pharma graphic enhancements to our account data. And I think when Alex and latin were talking, she had mentioned and none of us even knew, that 6sense apparently does this too. Yeah. And so I think our, I think there's like a couple of different scenarios. The first is just the Immediate question is, I guess I don't even know which company you bought, but like who did you buy, and to what extent can you, could you potentially serve as like a Zoom info replacement? And then there is like, hey, what, O, there's also this discussion of like, what is your core use case? And could that be of service? And so, I don't know, right? My, my more Immediate concern is like, you do like people stuff? So like let's talk about that. And then I think Alex was like, well, I'd like to see the full demo but that's the part we care about. And then John also wants to just follow along.

4:16 | Isabel

Okay.

4:17 | Alison

Yeah.

4:18 | Isabel

So transparently, yeah, there's a lot that 6sense can offer, right? We're a cart. So we help marketing, we help sales, we help Operations. What we can do tomorrow, is walk through both. So we can start with, hey, this is what our marketing platform offers and what we do for your team. And at the same time, this is what our sales platform offers, which is that Zoom info replacement. So for context, we started as an intent data research project out of cisco is was like 10 years ago. So when you think about the difference between Zoom and 6sense, our contacts are the same. Our, our contact data is on par with Zoom. We've run thousands of match rate tests and if we lose to this one, those to the next one. So we are on par. What's different is our intent data helps you prioritize those accounts. So like Zoom will give you thousands of contacts, but you might not know. Okay, where is this contact in the firing journey?

Is this contact even relevant to me? Is this an accurate e-mail and phone number? The difference is we're starting with the accounts that are Strong fit for your business, and then giving you quality contacts at those accounts. So it's kind of just a shift in how you go to market. But we do really align both teams under, our dataset. Okay? And.

5:46 | Alison

Also offer phermographic, like, so with Zoominfo, we do like instant enrich, and then we do weekly enriches, and then we have also like phermographic data around like employee count stuff like that. Yeah.

6:02 | Isabel

Yeah, we do absolutely. So tell me a little bit a little bit... and yes, you know, we have firmographic, so many filtered areas we can get into tomorrow. But just wanting to make sure I get an understanding of like where the team is at right now. So you're using a Zoom info for employee count? What is your target audience look like?

6:29 | Alison

For accounts or for people. Okay. So we have something that we use called client and prospect database where we basically like our top accounts are scored as a, and then it goes abcd. And so what we do is every year we do, I, it's like a combination of looking at industries employee count and like basically five other factors where we score our accounts, and that's different for enterprise mid market and SMB. So what, I guess it's too broad for me to say we are targeting education in this size. What I would say is like we went through this exercise using art and science and we have labeled our top accounts in each segment as, and our top accounts, you know, and then abcd. So, and then for people, the same thing we do again, it was sort of an art and science exercise where we've identified our top people by our tier one. And then we have tier two people. So we have, and that is also different, by segment where we look at a combination of what function are you in and what seniority are you in. And so we have people scored like our top people in enterprise. Our top people in each segment, our tier one or scored is thirties. And those are different based on whether you're an enterprise mid market. So in enterprise, we may only care about this seniority in a mid market, it may be different. And so we have that all built out and scored. So it's basically a question of like looking at a accounts and looking at in tier one is people that are scored as thirties. And so we have all this stuff on the back end that tells us that runs that those algorithms, in the back to say, okay, these are our best people at our best accounts. And now what we've been doing is recently going through an exercise to find our top accounts that don't have as many people. And so then looking for filling those gaps.

8:25 | Isabel

And when you said client and prospect database, that is something that you created in house or yes, the name of the com. Okay? Great.

8:33 | Alison

No, it's something we, it's so we're owned by vista equity partners. And it's one of their best practices of basically scoring your target accounts and so effectively rep should only be targeting amb accounts. And so it's how we tell them how to, it's our prioritization mechanism to make sure we're all focusing on what we believe are our top accounts. And then we go to redo that exercise annually to make sure that as that changes. Okay, we update it.

9:00 | Isabel

So, that's amazing in a similar fashion. So, like we take all this intent data and we would score essentially your accounts, but we update all of this nightly. So there's a little bit of, a more Immediate, you know, we want everything to be really current versus like a stagnant scoring model because the thought here is like things are changing so frequently. So when you have, you kind of have different seniorities and functions that you sell into. So every rep, how is their territory broken down?

9:40 | Alison

The.

9:41 | Isabel

accounts with?

9:42 | Alison

So we look to get the same amount of number of and B accounts in a territory. So that's how we, yeah, that's how we determine like a parody in the territories.

9:53 | Isabel

Yeah. Okay. And then what about on the marketing side of the house? What does pipeline generation look like?

10:02 | Alison

I mean, well, marketing generates over half of the pipeline, but I guess that, what do you mean?

10:07 | Isabel

We just, do, you know, like what strategies they're using? Is, is it LinkedIn? Is it google? Is it, you know, campaigns? Just curious if you have an idea and it's okay, if not of like kind of what their process is today.

10:22 | Alison

Yeah. So this is the most elaborate and biggest marketing. I've worked at companies 10 times bigger that have smaller marketing teams like.

10:30 | Isabel

We.

10:31 | Alison

a, it used to be that, yeah, no, this is, it's a very sophisticated marketing team. So we do a lot to optimize organic search. We do a lot around paid search. We do a lot around internal and external webinars, we do a lot around events that we run. We do surround dinners around like events that, you know, all the people in our industry go to, we do it's like all the things.

10:54 | Isabel

No, that's we.

10:55 | Alison

have our podcast like we, yeah, now that.

10:58 | Isabel

in perfect. So, what would you say is kind of the biggest challenge right now across Zoominfo, and just across like pipeline goals, you know, what's the challenge that the team is running into?

11:16 | Alison

I mean, we're trying to get people to generate more outbound. So, historically we were like on a, we were SMB, we've moved to market. We've had, it used to be that we relied 100 percent on marketing inbounds. It's just like a pretty nice way to be because I came from companies that like you assume that sales has to generate anything and everything and whatever you get from marketing is a bonus. And the people here are more like marketing does everything. And like historically, we are now at about a 50 50 split. But in order to keep growing sales needs to keep doing it, I mean, it's a lot around prioritization and focus. I think it, we, with the cap DB, like with the account scoring. And now we've recently aligned on the people scoring. I think what we're trying to do is we know better who our targets are. We need to add more of the good people with Zoom info. We've had some challenges where people didn't trust the data. Part of it is we were using the, we were using their chrome extension. And when you use their chrome extension, they're actually not giving you verified results. They're they're scraping the web. So if you want to get their verified results, you have to be on the, in their account. So part of it a, so part of it was like kind of user error on our part if you will. So we've been exploring other alternatives. I can't say that any of them are actually better. So that's sort of where all sort of like, I think maybe there's... unrealistic expectations from the business on like perfection where it's sort of like anytime you purchase data, it's gonna be somewhat import.

12:48 | Isabel

Perfect.

12:49 | Alison

Yeah. And so then it becomes really a cost game which is like okay is 6sense if you're on par. First of all, there's a change in cost of like resetting up all the... integrations. And then it becomes a question of like, okay, is it, are you significantly less expensive than Zoominfo to do the same thing? That could be appealing?

13:13 | Isabel

Okay. And I'll clarify, our contact data is on par. The, the workflow, the like reliability of quality data, verse quantity and the prioritization, is far past what Zoom offers. So, I think once we go through the demo, that will make a little bit more sense. But like for context from march which is when we released this like sales interface of last year to october, we replaced 109 Zoominfo sales... and that's not even counting like the marketing and the entire side of the house and what we've done since then. But just to share like typically, what we do here with folks who are coming over and making that switch, is that same fact of like, hey, it's really hard to trust the data and the workflow is a little bit of a struggle. So, there's a lot of, you know, everything that we do, is based in our intent data and the accuracy of that, and then built off of that. So definitely a little bit more of a reliable, you know, holistic approach to how you're going after these accounts.

14:33 | Isabel

So.

14:33 | Alison

For the 109 Zoom info replacements, do you happen to know if any of them are like vista? Do you, are you familiar with this equity partners? Yeah. Okay. Are you, do you happen to know if any of them are the like current portfolio companies?

14:48 | Isabel

Yes, I can uncover like exactly how many?

14:54 | Alison

I'd love to just.

14:54 | Isabel

Reach out to one of them?

14:55 | Alison

Yeah.

14:56 | Isabel

Yeah. You know, I can see if I can put like, a customer reference who's a vista company too. We work with them and insight often so... perfect. So, I love that you mentioned prioritization and focus like you guys definitely have an idea like who are your target accounts? You've built this, you know, homegrown scoring model. What would you say? Like future state you were to bring on either replace Zoom or bring on 6sense. You're like man, I feel so successful that we did that. Like what would that look like? Are there any metrics you're looking to achieve, or what's kind of the goals for this next year?

15:41 | Alison

It's interesting for me. It's like the sound of silence like, I don't, like it's people not complaining like, you know, at the end of the day and people not telling me like all this data shit. So it's really like that. Yeah, like, no, it's that people aren't it's the sound of lack of complaints, I guess.

16:02 | Isabel

Yeah. No, that's fair. What about in terms of like pipeline and revenue?

16:11 | Alison

I don't I guess from the tool itself?

16:14 | Isabel

Just a, are there any like overall pipe or revenue metrics you're looking to hit in the next year that the team is striving for?

16:22 | Alison

Yes, like we have bookings targets for the year, and then we have corresponding pipeline targets. So, you,

16:28 | Isabel

what does this look like the pipeline targets?

16:33 | Alison

I mean, I don't know them off the top of my head like some somewhere between three X to, you know, three X to four X are bookings targets.

16:43 | Isabel

No, totally fine. Sometimes it's helpful like if you have a quantifiable number like 5,000,000 in pipeline over this next year sometimes.

16:51 | Alison

No, it's like, I think we're at like 20,000,000 for the quarter. So no, it's that's yeah, no, it's more than that.

17:00 | Isabel

That's great. Yeah, just helpful to understand like where the teams and historically landed... amazing. So that's helpful. Anything else that you're kind of, you know, really wanting to dig into and focus on tomorrow.

17:21 | Alison

I think we need to get a sense of like, so you've got it sounds like the sales platform is the Zoominfo potential replacement. And then you've got this marketing platform, which is maybe your more traditional offering. I think the extent to which those are offered... together, the extent to, I think we need to look at understand ballpark pricing because we have budget for Zoominfo. We do not have budget for the other one for this year, but that doesn't mean that like, I mean,



we just need to like understand, is there a benefit if you buy two of them together? And also, if we were to significantly consider the sales platform, we would need to do like set up a trial and actually have people in there and start testing the data and then ask questions like can we import, I guess understanding what the user interface looks like? And can we import our custom fields into your system so that we can filter like there's a number of vendors that don't allow you, like I just told you about, we do everything based on our account grading and our people grading. And there are a number of vendors who don't actually let you import your fields and then filter that way. And so that's basically a nonstarter for us. So that's like some of like the kind of like those baseline requirements for us.

18:37 | Isabel

Yeah. You can always upload any account lists but.

18:41 | Alison

A like, can you like, can our system in your system talk?

18:47 | Isabel

Yeah. So, can you remind me what your CRM is?

18:51 | Alison

Salesforce?

18:52 | Isabel

Yeah. So everything we do is integrate it out of your Salesforce?

18:55 | Alison

Can we, can we import, put our fields in your system and filter in your system based on our fields?

19:01 | Isabel

I don't no.

19:03 | Glenn

I believe so at the bottom of the filters, on SI, where you can pull in say like reports and you can filter based off of things like that?

19:13 | Isabel

I don't know if we can add in specific filters like.

19:17 | Glenn

Okay.

19:18 | Isabel

Our database, but we can certainly explore that. Are there certain filters that you want to, that are like really relevant?

19:28 | Alison

Yeah. Like we don't want people we want them to look at our, on the account. We want them to look at the... hold on, at the account. We want them to look at capt, grade or account type, and then... at the person record or, yes, I guess kind of a cap is a big one or we want them to be able to filter where like I'm the account owner stuff like that?

19:55 | Isabel

You can absolutely do that. So that's all a part of. And when you say cap DB, I'm not sure.

20:01 | Alison

That's my abcd thing.

20:04 | Isabel

Okay. Yeah. And, you know, if there's interest here in exploring like how we can be a big piece of what 6sense does is essentially, we've built this model, for over a decade, right? So you have a great scoring model in place. We'll take that to the next level of like updating that scoring nightly. So we will actually prioritize similar to what you're doing today with like abc accounts. Like here are the accounts that the sales team should work today right now because they're hot accounts, their high intent, high engagement, and you can every rep can set their preferences to see who's in their territory that they should be going after. So that's definitely something we can explore about how we do that. But that's definitely a big piece, of 6sense essentially like what you have for scoring, but even better.

20:57 | Alison

Can you... can you... shoot, hold on? I had a question. I totally forgot it. Okay. Can you buy sales without marketing or do you have to buy them together?

21:17 | Isabel

Yeah, you can buy them individually. So we're part. So it's you know, it's what can we do to help the sales team? What kind of seats to help the marketing team?

21:26 | Alison

Okay.

21:27 | Isabel

The very out cart just kind of depending on where your team is at? What does it look like right now? In terms of, do you have any like metrics or understanding of like conversion rates, win rates, kind of what outbound is generating right now and what you want them to be at?

21:48 | Alison

I have all that. I mean, I have all those numbers somewhere. I don't have the, of the top of my head.

21:53 | Isabel

Yeah, that's okay. But you said right now it's about 50 50 outbound.

21:58 | Alison

The pipeline generation is about 50 50.

22:01 | Isabel

Okay, perfect. Yeah. So, you know, my plan for tomorrow is really recapping on where your team is at. And then let me just share kind of what I've put in here so far based on what you've said.

22:29 | Isabel

So, using employee, right? Looking at the employee accounts, you have that prospecting database within your system. So abcd scoring models, function seniority. Again, all of that's a part of marketing is obviously really extensive. I imagine sales is just looking at Zoom info, looking at their accounts. And then, so biggest difference is like we can take you from your icp and show you who's you're actually in market icp. So like who's ready to buy today that your sales team can start to target, of course, can you do that?

23:07 | Alison

That only within sales? Or do you have to buy sales and marketing to get that?

23:11 | Isabel

No. So that's kind of the whole concept of 6sense is like, hey, we started to understand like what is marketing and sales care about? And now it's been a decade and we're able to show you okay of all the accounts that you could sell into, who are the accounts that are Strong fit for you? They're in market today. They're ready to buy. Because like from a sales perspective, I wouldn't want to waste time on accounts that marketing needs to warm up. And we tell you like who's on that buying team? How can you contact them in the best way? Who are the people that you should engage with? So so definitely like a holistic approach to what you're doing.

23:49 | Alison

Mm. Hmm.

23:51 | Isabel

Yeah. Anything that you'd add here in terms of like future state success struggles today that you'd love to solve if you could, even if it's in the Operations realm, just trying to get more of an understanding of like where the team is at.

24:08 | Alison

No, I think I'm just really trying to understand the difference between what's included in the ala carte sales versus marketing piece, and then sort of what licensing looks like. And then obviously like just rough pricing.

24:19 | Isabel

Yeah. So in terms of sales and marketing, like how we're broken down, this side looks a little crazy, but the thought is like 6sense starts with the data layer. So we are uncovering anyone who's on your site anonymously, we are giving those like company graphics, techno graphics, all of that and just that intent. So anyone who has a propensity to buy from your team.

24:45 | Alison

Mm. Hmm.

24:46 | Isabel

And then it's how we action on it. So we have marketing interface and a sales interface. Sales is going to be prioritization hot accounts today that you should work just to kind of give you a glimpse scrolling here. But a day in the life of a seller is like you come into your Salesforce, you have a dashboard, let me Zoom in. You have a dashboard of all the accounts in your book of business. Here are the hot accounts to work today. Here are the people at that account that are maybe increasing in engagement. Maybe you haven't contacted them yet, you know, the buyer just.

25:24 | Alison

Those only people that are already in our system?

25:27 | Isabel

No, they can be in or not in today. So we're tracking in both in your CRM and not. Okay, contact company data, technographic data. And then you can unlock these contacts and push it directly to your Salesforce. So it's kind of the day in the life of a seller. But when we go into the demo tomorrow, it will make a little bit more sense. Sure. But I think when you think of like what's the foundation of what we're doing is we're pulling in. Okay. Who's on your site, whether or not they fill out a form. Like there's a lot of signal that you're missing today, then we have an intent network of millions of publishers. So anytime keyword research is being done, you can track as many keywords as you want. They're completely customizable. We're tracking 3,000 for reference. So there's no like predefined topics or limitations you have there. So you would put in like your competitors, your products, anything that would be top of funnel for your team, integrate this into your Salesforce to say, okay, all these signals that we're pulling in? Who's at the top of the funnel that maybe marketing needs to educate, invite to webinars, send Display ads to who's at the middle of the funnel that maybe needs your more, you know, expensive marketing channels like a LinkedIn, and then who's at the bottom of the funnel that sales should really be prioritizing. So we're bucketing these accounts into where they are in their journey.

27:01 | Alison

Okay. And then how do you price at least on the sales side versus?

27:05 | Isabel

Just a good question. How many users are you looking to have? Or how many do you have today?

27:12 | Alison

Like 100?

27:13 | Isabel

Okay. And how do you know, like credit consumption? Like how many credits are allocated? How many like 400?

27:22 | Alison

To 500,000?

27:24 | Isabel

Do you know how many are actually consumed?

27:28 | Alison

Like four or somewhere between four and four and 50.

27:33 | Isabel

Okay. Four and four, 50 credits consumed. Okay. So, yeah. So definitely something we have to kind of scope out in terms of like what credit allocation makes sense? We'll do that more tomorrow, but we are kind of depending on number of users for ballpark, like three users. 30,000 credits is around 20 K. So if we're talking 100 credits or excuse me, 100 users, that would just be something we would need to scope. So you'll actually have a solutions engineer on the demo tomorrow. Seems all is amazing. So hard to give like exact numbers until we kind of scope the use case, and the amount of users and credits specifically. But we can certainly, you know, jump into that after the demo set up time, to discuss commercial.

28:28 | Alison

Okay. Cool.

28:29 | Isabel

And when is your Zoom info contract?

28:33 | Alison

It is soon in the next couple of weeks, I think.

28:40 | Isabel

One thing I do want to flag that we have seen happen with some info customers is just being aware of the opt out date. Sometimes if you're pass that we actually can't... sell to you regardless. So just something to not.

28:58 | Alison

Let me look. I'll look up what the app to date is.

29:00 | Isabel

Okay. Amazing. Great. Well, I'm excited to jump into this tomorrow. We'll really focus on both marketing and sales. I would say we can absolutely set up more time after tomorrow to kind of dig into the marketing and Operations side of the house. Like more in depth, we'll kind of keep that high level and then really dig into sales and focus there in terms of just kind of wanting, to prep with my SC tomorrow. Is there anything else that you'd add around like industries or your target market? I know it's pretty broad and you can sell to a lot of folks. But just if you have any more insight on like who you'd really like to focus on?

29:50 | Alison

I mean, it differs by, I mean, we sell, do a lot of software companies, we... sell a lot of health care, we sell to like insurance, but I mean it's a pretty wide range. We started as an SMB company, and then we're selling to, you know, like, our deals range from 5,000 to like almost a 1,000,000 dollars. So like this emergency communication is relevant like to, you know, like we're selling to organizations between 500 employees and 500 to 1,000 employees. And so certainly I would say 500 employees to like 15,000 is probably more of like the more common sort of sweet spot. But there's like it is applying across like a pretty wide range and even when in different market segments, like we do have slightly different, you know, scoring by industry. So it's like pretty elaborate. Yeah, like we get into sub industry level for scoring which is fairly painful on my end.

30:54 | Isabel

Yeah. And again, all things we can help with, but that's awesome. I mean, we're the same here as is we have such a vast variety of companies that we sell and to, from the biggest.

31:07 | Alison

Yeah.

31:07 | Isabel

The of the world. So, yeah, we can certainly dig into like, the biggest thing I see is like we can really help with prioritization, the quality of the accounts that you're going after, understanding where they are in their buying cycles. So we're only going to increase conversion rates, but all things we can dig into more tomorrow.

31:26 | Alison

Okay, awesome. Thank you. Bye.

31:28 | Isabel

Thank you so much hope you have a career.

31:30 | Glenn  
Thank you.

31:30 | Alison  
Too. Bye bye.

31:31 | Glenn  
Take care. Bye.