



*Created for Pipefy*

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**If you need help with your inbound or outbound strategy feel free to reach out.**

## ***Fictional Outbound Demand Gen Scenario***

**Scenario:** It is the end of Q2 and we have insights that after the first half of the year, our outbound sales channels are performing better than our inbound sales channels. We are therefore looking to shift our demand generation program and budget spend mix away from Inbound (new to our database logos) to support outbound sales (new ARR from the current database). Your budget is \$500k for H2, how would you go about building your Demand Generation plan?

### **Things to keep in mind:**

- Vertical/use case support - think about how you would not only support outbound sales but support it across our 3 vertical ICPs (HR, Finance, IT)
- Be creative, the appetite for risk is high
- Include how you would measure success (leads, pipeline, ARR) across the programs in order to make key decisions to pivot away or double down from something that is or is not performing well.
- Include how you would ensure strong sales-marketing alignment, building a "one team" mindset
- As part of the presentation be sure to talk through the thought process of how you would/did go about building your strategy.
- Most importantly, have fun with it!

## **Executive Summary**

The Demand Generation function plays a critical role in driving revenue growth and maximizing the potential of marketing efforts. It intersects marketing, sales, and product development, focusing on customer acquisition, activation, retention, and upsell. In the pursuit of growing revenue and profits, it is essential for all functions to contribute to this goal. However, teams often become siloed, focusing only on their specific metrics.

This executive summary is designed as a high-level strategy document specifically tailored to a scenario provided by Pipefy. It shifts the focus toward Demand Generation and provides insights into foundational marketing elements while highlighting growth opportunities. It is important to note that some recommendations may have already been implemented by your team, and this document aims to provide a comprehensive overview of the strategic approach to Demand

Generation. By aligning marketing efforts with revenue goals and adopting a holistic approach, Pipefy can unlock the full potential of its marketing initiatives and drive sustainable growth.

## Thought Process & Strategic Approach

### Customer Journey Mapping & Persona Refinement

The first step before building out new systems or workflows is to conduct an analysis of current marketing efforts and collateral. This would allow for the identification of areas that could quickly scale or should be discontinued due to lack of ROI. The review would include an analysis of the current target market, competitors, personas created, customer journey map, and past campaign metrics. If the customer journey map has not been created, then that will become an immediate priority. The same is true for in-depth persona development. Without a clear target market and a lack of touchpoint mapping, the development of a demand generation model will not be successful.

Because Pipefy already has active customers, the most logical place to start would be to identify the most profitable and best customers (these could be different groups). In the past, I have utilized the Claritas PRIZM model to associate customer groups within the 66 segment models they have developed. A prior persona creation document and customer journey map that I created can be seen here:

[https://drive.google.com/open?id=1JHYBFGyYLqWpI\\_aM\\_QS7E3hxZvaLPnr5](https://drive.google.com/open?id=1JHYBFGyYLqWpI_aM_QS7E3hxZvaLPnr5)

Although the PRIZM model is focused on b2c consumers, it can still give us insight into the individual decision-makers within the B2B industry. A very high-level workflow of the process can be seen below:

- Review current clients and identify customer base composition (*See image 1 below as an example*)

- Determine ideal customer, most profitable customer, and actual customers. Are they in alignment?
- Develop persona narrative utilizing psychographic and demographic factors
- Map out each customer touchpoint throughout the funnel (*See image 2 as an example*)
  - If tracking data is available, determine leakage areas
- Understand the thought process of the customer during each part of the journey (*See image 3 & 4*)
- Identify actionable opportunities for improvement

	Crossovers—31%	Classics—20%	Hot Rods—18%	Modest Coupes—18%	Hybrids—12%
Age	45-54	65-74	55-64	65-74	25-34
HH Comp.	Married Couple – Children <18 and 18+	Married Couple Only	Married Couple – Children 18+	Married Couple Only	Married Couple – Children <18
HH Income	\$250,000 or More	\$250,000 or More	\$150,000-\$199,999	\$40,000-\$49,000	\$40,000-\$49,000
Employment	Management White Collar Mix	Retired White Collar Mix	Management White Collar Mix	Retired White Collar Service Mix	Management White Collar Blue Collar Service Mix
Education	Post Graduate Degree	Post Graduate Degree	Post Graduate Degree	Did Not Graduate High School	Bachelor's Degree
Home Value	\$500,000+	\$500,000+	\$200,000-\$499,999	Under \$50,000	Under \$50,000
Automotive	Plans to buy new/used/leased van or minivan in next 12 mos  Make of vehicles leased/owned: Isuzu, Hyundai, Hummer	HHLD leases 4 or more vehicles  HHLD plans to pay \$45,000+ for new/leased vehicle in next 12 mo  Own/lease Jaguar and Audi	Make of vehicles leased/ owned: Mercedes, Lincoln  Amount HHLD plans to pay for new/leased vehicle in next 12 mo – \$30,000-\$34,000	Make of vehicles leased/ owned: Volvo, Saturn	Number of vehicles HHLD leases: 3  Make of vehicles leased/ owned: Volvo, Suzuki, Subaru
Shop at	- Crate & Barrel - Kohl's - Macy's - Lane Bryant - BJ's Wholesale - Walmart.com - Amazon.com - Banana Republic	- T.J. Maxx - Lands' End - Kmart - L.L. Bean - Saks Fifth Avenue - Neiman Marcus - Talbots - Sam's Club	- Nordstrom - Eddie Bauer - zappos.com - Office Max - Pottery Barn - hotels.com	- Avon - QVC - Office Depot - Catalogs - Tractor Supply Company - drugstore.com - Sears Hardware	- Bloomingdale's - The Disney Store - Mary Kay - sears.com
Hobby	- Skiing - Water Skiing - Vacation Abroad - Visit the Zoo - Action Figures - NBA Games - Beach Vacation - Business Travel	- Vacation for 2+ weeks in Europe - Religious Clubs - Own treadmill - Collect stamps - Collect art - Go sailing - Contribute to PBS	- Play tennis - Buy collectibles - Cross country skiing - Go bowling - Travel by rental car - Cruise vacations	- Go to NFL games - Own motor home - Romance Novels - Needlepoint - Own an RV - Crafting - Hunting	- Travel to Asia - Buy Spanish/Latin Music - Go to ice hockey games - Own horse
Read	- The Economist - Seventeen - Fit Pregnancy - People en Espanol - Field & Stream - National Geographic Kids - Shape - New York Times	- Smithsonian - AARP Magazine - Saturday Evening Post - American Legion - The Atlantic - Smart Money - Kiplinger's Personal Finance	- Yoga Journal - Backpacker - Wine Spectator - USA Today - Travel + Leisure - Yachting	- Ebony - North American Hunter - Catholic Digest - Soap Opera Weekly - VFW Magazine - Bassmaster - American Hunter	- Dwell - Family Fun - Four Wheeler - Parenting
Watch	- HBO - Awards Shows - Masterpiece - E! Entertainment - Ellen DeGeneres - Spanish Lang TV - Disney Channel - The Biggest Loser - Tennis	- Hallmark Channel - Crimetime Saturday - The 700 Club - Golf Channel - Live from Lincoln Center - Antiques Roadshow	- NHL games - The Big Bang Theory - Indy Car Series - The Mentalist - Washington Week - Globe Trekker	- ABC News: Nightline - New Yankee Workshop - Inside Edition - Judge Judy - Bold & Beautiful - Country Music TV - NASCAR	- Independent Film Channel - Animal Planet - Maury - MTV

IMAGE 1

## Customer Experience Map

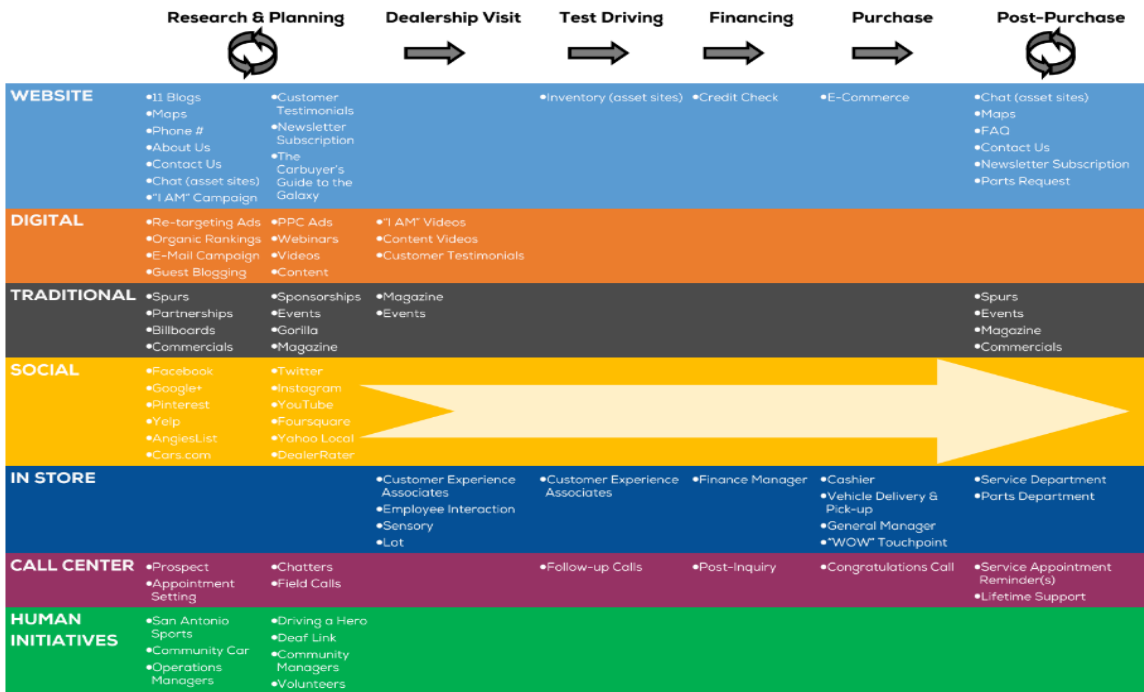


IMAGE 2

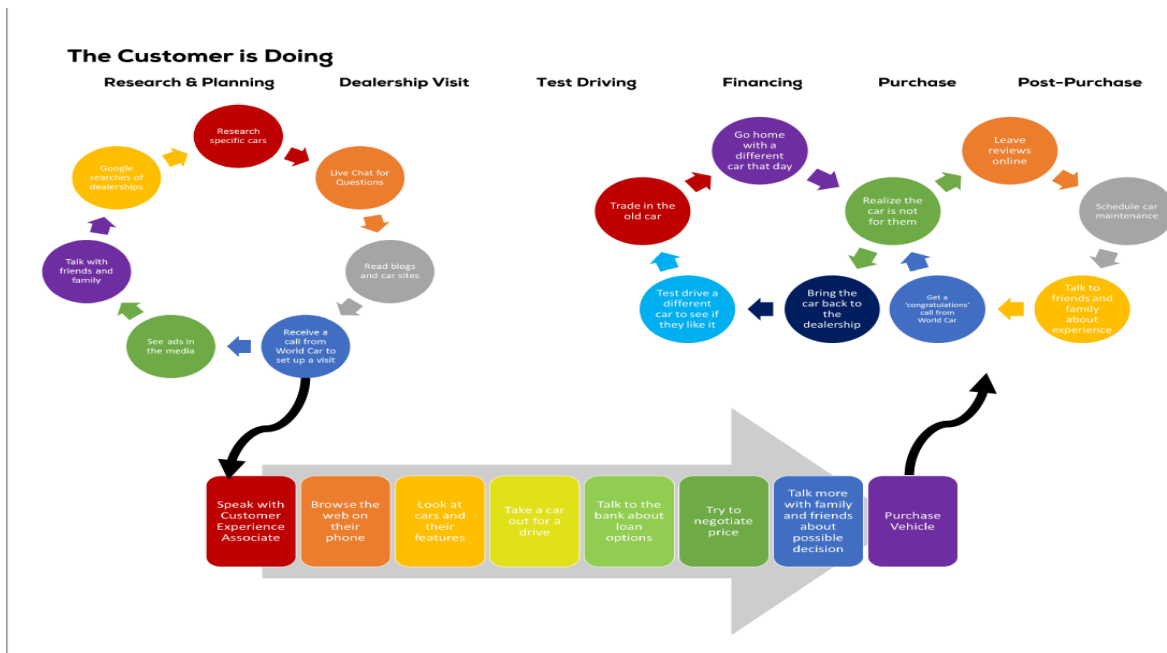


IMAGE 3

## Thinking, Feeling, Experiencing

	Research & Planning	Dealership Visit	Test Driving	Financing	Purchase	Post-Purchase
<b>THINKING</b>	<ul style="list-style-type: none"> <li>• I need a new car.</li> <li>• I want something pretty.</li> <li>• What features do I want?</li> <li>• How much can I spend?</li> <li>• How long do I want to drive my next car?</li> <li>• Do I want a new or used car?</li> <li>• What are my trade-offs?</li> <li>• Do I want to trade in my current car?</li> </ul>	<ul style="list-style-type: none"> <li>• Why should I buy here?</li> <li>• Are they going to give me a good deal?</li> <li>• What is their reputation?</li> <li>• Do I know anyone who has shopped here before?</li> <li>• What do others think about this dealership?</li> <li>• Do other customers look happy?</li> <li>• Are the sales people willing to listen and be helpful?</li> </ul>	<ul style="list-style-type: none"> <li>• Do I see myself in this car?</li> <li>• Do I like how this car drives?</li> <li>• How is the gas mileage?</li> <li>• What will my insurance rate be?</li> <li>• Am I sure this is the car I want?</li> <li>• Do I know anyone who has this car?</li> <li>• Have I asked all the questions I have?</li> </ul>	<ul style="list-style-type: none"> <li>• I hope my credit is okay.</li> <li>• Can they give me a good rate?</li> <li>• How long do I want to take to pay off my car?</li> <li>• Who do I want to finance my car through?</li> </ul>	<ul style="list-style-type: none"> <li>• I hope I made the right decision.</li> <li>• Do I have everything I need to safely and legally drive off the lot today?</li> </ul>	<ul style="list-style-type: none"> <li>• I love this car.</li> <li>• I hope nothing happens to my car.</li> <li>• How can I schedule maintenance to my car?</li> <li>• How will I be treated if I come back for my next purchase?</li> <li>• My car broke down on the road and I need to get in touch with the lifetime warranty department. I hope they can help me on the other side of the country.</li> </ul>
<b>FEELING</b>	<ul style="list-style-type: none"> <li>• I'm curious about the options available.</li> <li>• I'm excited to get something new.</li> <li>• What if I can't afford this?</li> <li>• I don't want to make the wrong choice.</li> </ul>	<ul style="list-style-type: none"> <li>• I'm nervous about the reality of my need.</li> <li>• I'm an Informed consumer.</li> <li>• I feel vulnerable in an environment where the sales person is in charge.</li> <li>• I'm unsure that now is the best time to make my purchase.</li> <li>• I feel like I'm being taken advantage of because the sales people know I need a car today.</li> </ul>	<ul style="list-style-type: none"> <li>• I'm excited to be driving this car.</li> <li>• I'm nervous to have a new car to be responsible for.</li> <li>• I'm intrigued by all the updated features in this car.</li> <li>• I'm anxious about finalizing my decision to buy a new car.</li> </ul>	<ul style="list-style-type: none"> <li>• I'm nervous about my credit.</li> <li>• I'm self-conscious about a stranger knowing my personal information.</li> <li>• I feel vulnerable about people knowing so much about me.</li> <li>• I'm stressed about the amount of money I'm committing to spend.</li> <li>• I'm hopeful that a new car will make me feel better about the future.</li> </ul>	<ul style="list-style-type: none"> <li>• I'm relieved that I've finally made the purchase.</li> <li>• I'm excited to tell everyone about my new car.</li> <li>• I'm nervous that something will happen to my new car.</li> </ul>	<ul style="list-style-type: none"> <li>• I'm glad I bought my car from World Car.</li> <li>• I'm excited to share my car-buying story with my friends and leave a review online.</li> <li>• I'm lucky to have such a great warranty and lifetime support if something happens to my car.</li> </ul>
<b>EXPERIENCE</b>	<ul style="list-style-type: none"> <li>• This website is very clean and easy to follow.</li> <li>• The website has all the information I've been looking for.</li> <li>• This is my one-stop-shop for all of my car buying information.</li> <li>• World Car really gives back to the community.</li> </ul>	<ul style="list-style-type: none"> <li>• Are they respectful of my time?</li> <li>• This dealership feels very comfortable.</li> <li>• World Car has a great personality.</li> <li>• This brand speaks to my family.</li> </ul>	<ul style="list-style-type: none"> <li>• This car drives very nicely.</li> <li>• I want to drive this car fast on the highway.</li> </ul>	<ul style="list-style-type: none"> <li>• Why are they discussing my credit score with other people listening?</li> <li>• They really were able to work with my budget.</li> </ul>	<ul style="list-style-type: none"> <li>• This salesman seems very happy for me.</li> <li>• World Car left me a nice gift in the coffee holder. How kind of them.</li> <li>• I'm now part of the World Car Family.</li> </ul>	<ul style="list-style-type: none"> <li>• World Car really gives back to the community.</li> <li>• The Roadside Assistance really saved the day while I was traveling.</li> <li>• When I brought my car in to get serviced, I was treated to a very nice waiting room environment.</li> </ul>

IMAGE 4

There are many new tools that are AI-powered that may be worth looking into to help make this less manual.

If the customer journey has already been mapped and each stage in the funnel has been tracked, then I would be able to dig deeper into each touchpoint to identify inefficiency.

## Strategy and Metrics

Once customer journey mapping is complete and a deeper understanding of our customer is obtained, then I would typically develop a multi-tiered strategy. This would include short (90 day roadmaps), medium (1 year), and long term (1+ year) strategies.

One example is to breakdown anticipated revenue by traction channel. These revenue numbers are determined by working backward from the annual revenue goal.

	A	B	C	D	E	F	G	H	I	J	K	L	M
		July 2023	Actuals	August 2023	Actuals	September 2023		October 2023	November 2023	December 2023		Total MRR	Total ARR
1													
2													
3	US/CA/ NEW MRR TARGETS	\$1,250.00		\$2,500.00		\$3,750.00		\$5,000.00	\$7,500.00	\$8,750.00		\$28,750.00	\$345,000.00
4													
5	Brazil NEW MRR TARGETS	\$0.00		\$1,250.00		\$2,500.00		\$3,750.00	\$3,750.00	\$5,000.00		\$16,250.00	\$195,000.00
6													
7												\$45,000.00	\$540,000.00
8							\$11,250.00				\$33,750.00		
9													
10	Direct Mail	1.00		1.00		1.00		2.00	1.00	2.00			
11	Event Sponsorship					1.00		1.00	1.00	1.00			
12	Webinars			1.00		1.00		1.00	1.00	2.00			
13	Industry-Specific Publications					1.00			1.00				
14	Quest for Workflow Excellence Campaign							2.00	2.00	2.00			
15	Paid Social					1.00		1.00	1.00	2.00			
16	Cold Outbound			1.00					2.00	2.00			
17													
18		\$1,250.00		\$3,750.00		\$6,250.00		\$8,750.00	\$11,250.00	\$13,750.00		\$45,000.00	
19													
20	MQLs	40		40		60		80	120	140			
21	Direct Mail	20		10		15		10	15	25			
22	Event Sponsorship	5		5		10		10	15	15			
23	Webinars	5		10		10		15	20	30			
24	Industry-Specific Publications	0		4		5		10	10	10			
25	Quest for Workflow Excellence Campaign	0		5		10		13	15	15			
26	Paid Social	5		5		10		12	25	25			
27	Cold Outbound	5		1		0		10	20	20			
28													
29	Sum	40		40		60		80	120	140			

However, in the case of Pipefy, I would want to spend time looking at the current Value Proposition. Is the messaging resonating with our ideal customer? Is it leading to our expected conversion rates?

Without getting into too much detail here - I would implement two strategies.

- 1) Understand the Pipefy **brand Archetype** (this is based on Carl Jung's personality archetypes). Is our archetype correct, do we need to modify it? The purpose of this is to

help our long-term branding better connect with our target client. This would include what Dr. Peter Steidl calls Touchpoint Engineering. Where we review and ensure our archetype is coming alive.

- 2) The second strategy that I would recommend using is going through the 10-step positioning process as outlined and developed by April Dunford.

After that then I would move on to tactical efforts. The short-term tactics will be granular and closely monitored for success using predefined goals and metrics. A quarterly roadmap document would be created to ensure transparency and alignment for all company stakeholders. I would incorporate the Bullseye Framework to allow us to test multiple traction channels with quick sprints. An example tracking document for this can be seen here:

<https://drive.google.com/open?id=1ZBZTI1NTI8Q6c9n7DGeOC8faNYQYSFt-6oa7IMgkLul>

The medium and long-term strategy document will take a higher-level look at goals and strategies. It will incorporate a SOSTAC (Situation, Objective, Strategy, Tactics, Actions, Control) and PRACE (Plan, Reach, Act, Convert, Engage) methodology. I have put together an initial draft outline of the process for review here:

<https://docs.google.com/document/d/1S1icpOucmF24aLJniPBBn1cCOfl5EAdunkwugSD1Or8/e/dit?usp=sharing>

***\*Please note – budget allocated for this will determine the strategies and tactics used.***

To track everything, an internal dashboard will need to be created that is segmented by each funnel stage. This can be built out in Hubspot/Marketo. Tracking the following metrics will allow for month-over-month comparisons to ensure improvement and help plan for any pivot due to a downward trend. An example excel tracking document can be seen here:

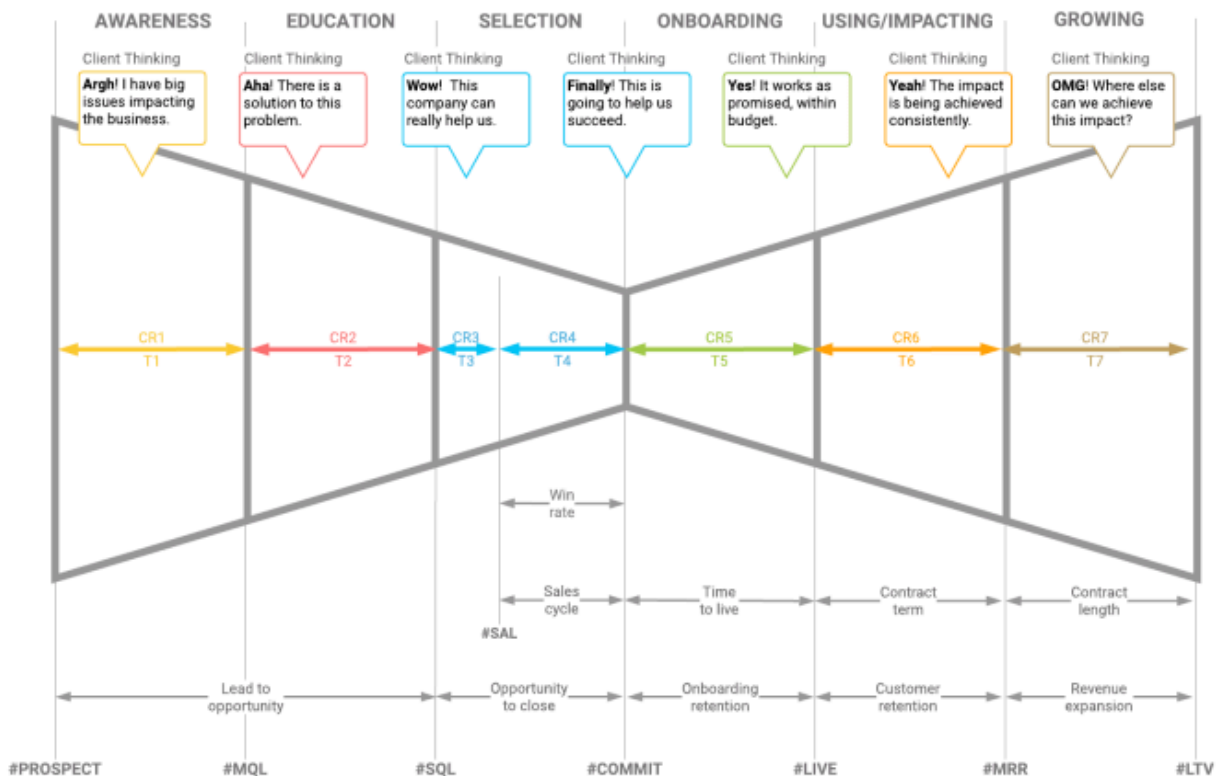
<https://drive.google.com/open?id=1easNWIPUqQVdgEEemX6CkSWdokMEzdV00>

**Of course this should be coupled with financial tracking tools like Chartmogul or Chart.io so that cohort analysis and real-time data can be reviewed.** It really comes down to the current available assets and how to ensure tracking in the quickest and most efficient manner.

- Reach
  - Total Reach
  - Reach by Channel
- Online traffic (Visits)
  - Total Website Visits
  - Visits by channel
- Leads
  - Total Leads
  - Leads by source
- Customers (these are MQL's that turn into clients)
  - Total Customers Driven by Marketing
  - Marketing Generated Customers by Source
- Gross / Net
  - By Channel
  - Marketing Generated
  - MoM Growth
  - Total online
- Customer Value
  - By Source
  - Avg Monthly Value
- Cost Acquisition
  - By Source
  - Avg Monthly Value
- Conversion Rates
  - Visit to Lead
  - Lead to Customer

- Visit to Customer

For recurring revenue organizations, I also like to utilize the Bowtie Model (created by Winning by Design).



This allows you to set your Volume, Conversion, and Time metrics.

These are the primary metrics that I review when building out a dashboard. However, there are tools such as Hubspot that allow for integration with data warehouses (such as Segment) and can reduce some of the manual data gatherings. This example dashboard is generalized and will be tailored to Pipefy and your specific workflows. One key thing to note is that this data can only be adequately aggregated if there is solid communication between sales, marketing, product and CS.

# Scenario Response

## Shifting Gears: From Inbound to Outbound

Recognizing that our outbound channels are outperforming inbound, we're at an exciting turning point in Pipefy's growth story. It's the opportune time to pivot our approach and fuel this momentum by allocating our demand generation program and budget in favor of outbound sales. A few of the data points that are driving the shift are listed below:

- Lower conversion rate and longer sales cycle observed in inbound sales
- Inbound efforts predominantly attract small and medium-sized businesses (SMBs)
- Strategic shift towards a healthier customer cohort with a focus on organizations with 200+ employees

As we embark on this journey, it's vital to remember that shifting gears doesn't mean losing sight of the road. While the destination remains the same - generating new ARR from our current database - our route and our vehicle of choice are changing.

We're not merely focusing on sales, we're channeling our efforts across three vertical ICPs (HR, Finance, IT). The challenge here is multi-layered, and our solution must reflect this complexity.

In the subsequent sections, we'll walk through a strategy that not only supports outbound sales across these verticals, but also strives to ensure we're all on the same bus heading towards the same destination - Sales and Marketing, as 'One Team'.

### **Assumptions/ Benchmarks:**

- CAC Payback period of 11 months
- Sales Cycle 3 months

- Expectations : LTV:CAC 3:1
- LTV: \$41,666 (33 months)
- CAC: \$13,888
- ACV: \$15,000
- Database for ABM: 50,000

**SQL Definition** - Senior level member (Director, Head, C-Suite) within one of our 3 ICPs (HR, Finance, IT). They must also be part of a 200+ organization and have signed up for a trial or scheduled a call with the Sales Team.

**SQL Definition** - Spoke to sales and demonstrated interest, financial ability, and a reasonable time horizon.

## Channel breakdown: LinkedIn

LinkedIn is a crucial platform for B2B marketing, given its professional audience and powerful targeting capabilities. For Pipefy, we'll make full use of this platform to connect with our target personas in the HR, Finance, and IT verticals.

### Sponsored Content:

Sponsored content allows us to share valuable, insightful content directly in our target audience's feed. This can be used to establish Pipefy as a thought leader in business workflow automation.

**Example:** We can sponsor a post sharing an eBook titled "Streamlining HR Workflows for Greater Efficiency". This eBook will provide valuable insights for HR professionals and subtly highlight how Pipefy can facilitate this streamlining process.

## Message Ads:

Message Ads (formerly known as InMail) provide an opportunity for direct, personalized communication with potential customers. This is particularly effective for higher-stakes proposals, like invitations to events or demos.

**Example:** We can use Message Ads to invite Finance professionals to a webinar showcasing how Pipefy has helped other businesses automate their financial workflows and increase efficiency.

## Text Ads:

Text Ads are straightforward, cost-effective, and excellent for boosting visibility. They typically involve a small, clickable image and a short line of text.

**Example:** A Text Ad could show a short testimonial from an IT professional who has had success with Pipefy, with the text reading "Streamline Your IT Processes with Pipefy. Learn More Today!"

## LinkedIn's Matched Audiences:

LinkedIn's Matched Audiences feature allows us to retarget website visitors, market to contacts from our customer databases and marketing automation platforms, and reach decision-makers at target accounts.

**Example:** We can upload a list of email addresses from our current database to LinkedIn. We can then create a campaign to target these contacts with personalized content that aligns with their stage in the sales cycle.

## Account-Based Marketing:

For key accounts, we can use LinkedIn's Account Targeting to focus our efforts. This involves uploading a list of target companies to LinkedIn, which then cross-references against its database to create a list of users to target with our content.

**Example:** We already have a list of companies we know could benefit significantly from Pipefy's solutions, we can use Account Targeting to make sure our content is getting in front of decision-makers at those companies.

We'll also employ A/B testing for all LinkedIn campaigns to continuously improve and optimize based on data-backed insights. We'll compare different ad formats, creatives, and copy to see what generates the best engagement and conversions.

## Industry Specific Publication Strategy

Industry-specific publications provide a direct line to our key verticals. By leveraging these platforms, we can reach our target personas where they already consume content. Here's how we'll approach each vertical:

### HR Vertical:

Platforms such as HR.com, Workforce, and SHRM (Society for Human Resource Management) are widely read by HR professionals. These platforms often host webinars, publish eBooks, and run display ads, all of which are opportunities for Pipefy.

**Example:** Sponsor a webinar on HR.com titled "The Future of HR: Streamlining HR Processes with Automation." Simultaneously, we can run display ads promoting Pipefy's solutions for HR.

### Finance Vertical:

Finance professionals often frequent platforms like CFO.com, Accounting Today, and Financial Times. They are interested in articles and resources that can help them stay updated with the latest trends and improve their financial operations.

**Example:** Create a sponsored post on CFO.com featuring a case study about how a finance department significantly improved their efficiency with Pipefy. Also, run a banner ad promoting Pipefy's financial workflow solutions.

### IT Vertical:

Websites like TechCrunch, CIO.com, and IT World cater to IT professionals and decision-makers. They often look for content that can help them understand new technologies and improve their IT processes.

**Example:** We could publish an article on CIO.com titled "The IT Department of Tomorrow: How Workflow Automation is Changing the Game." Alongside the article, we can display ads promoting Pipefy's solutions for IT departments. (*We can run these ads through platforms like Outbrain*)

Remember, all campaigns on these industry-specific publications will be supported by strong, engaging creative and clear, compelling CTAs to drive conversions. Moreover, we'll track the performance of these campaigns to understand what's resonating with our audience and adjust our strategy accordingly.

## Email Outreach Strategy

Email remains a powerful channel for B2B communication, particularly in demand generation. Our strategy will entail segmentation and personalization to increase the effectiveness of our outreach. Here are some campaign ideas:

### Segmented Email Series:

We'll divide our database into segments based on the verticals (HR, Finance, IT) and further divide them based on their stage in the sales funnel. This ensures that the content we send is relevant to the recipient's needs.

**Example:** For HR prospects in the awareness stage, we might send an email series titled "Revolutionizing HR Operations with Workflow Automation". The series would start with a broad overview of the benefits of automation, followed by specific ways Pipefy can streamline common HR processes, and finally a case study demonstrating how a company similar to them succeeded with Pipefy.

## Account-Based Email Campaigns:

For high-value accounts, we'll create personalized email campaigns. These will use information specific to the recipient's company to demonstrate how Pipefy can address their unique challenges.

**Example:** If we're reaching out to a finance company that's publicly spoken about the challenges of remote finance operations, we could send them an email series titled "How Pipefy Can Help [Company Name] Streamline Remote Finance Operations." Each email would address a different pain point related to remote work and how Pipefy can solve it.

## Cold Email Campaigns:

To reach new prospects, we'll send cold emails that offer value upfront and clearly communicate the benefits of Pipefy.

**Example:** For IT prospects, we might send an email titled "Unleashing the Power of IT with Pipefy". The email would include a free eBook about the role of IT in digital transformation, subtly highlighting how Pipefy fits into the picture.

All emails will end with a clear call-to-action, whether it's booking a demo, downloading a resource, or reading a case study. We'll closely track email metrics like open rates, click-through rates, and conversions to understand what's working and iterate on our strategy.

To maximize our email strategy's success, we'll adhere to email marketing best practices and continually test and iterate on our approach. Here's how:

## Email Sequencing:

For nurturing prospects, a sequence of 3-5 emails over 2-3 weeks often works well. Each email should offer distinct value and progressively guide the prospect closer to the desired action.

## Subject Line Testing:

The subject line is the first impression of an email. It significantly impacts open rates, so we'll test different subject lines to determine which works best. We can experiment with:

- Questions vs. Statements: Does asking a question engage more people, or is a statement more effective?
- Personalization: Do subject lines with the recipient's name or company get more opens?
- Length: Does a shorter or longer subject line perform better?
- Testing will allow us to gather data and improve our subject lines over time.

## Avoiding Spam Filters and Blacklisting:

To prevent our emails from landing in spam or getting our domain blacklisted, we'll follow these strategies:

- For cold outbound we will use a new similar but different domain for email sending. This is to ensure our main domain never gets put at risk for blacklisting. We can use tools like lemlist or instantly to warm new IP's and monitor email deliverability health.
- Consistent Send Volume: Sudden spikes in email volume can trigger spam filters. We'll maintain a consistent volume of emails.
- Engagement Tracking: ISPs monitor whether emails are opened and interacted with. We'll remove contacts who consistently don't engage to improve our engagement rates.

- Opt-out Mechanism: Every email will include a clear and easy way to opt-out, as required by the CAN-SPAM Act.
- Clean List: We'll regularly clean our email list to remove invalid addresses, which can hurt our sender reputation.

Lastly, we'll respect the recipient's time and attention. We won't bombard them with emails and each message sent will be thoughtfully designed to provide value, thereby minimizing the chances of being reported as spam.

## **Diving into Webinars and Virtual Events**

Webinars and virtual events provide an excellent opportunity to present Pipefy as a thought leader and solution provider in the HR, Finance, and IT sectors. Here's how we could utilize these tools:

### **Webinar Series:**

A series of three webinars, one for each vertical (HR, Finance, IT), could be a strategic starting point. We could engage industry experts or influencers to share the stage and discuss common challenges and how Pipefy helps address them. Here are some topic ideas:

- HR: "Navigating Remote Work: Boosting Employee Engagement and Efficiency with Pipefy"
- Finance: "Smarter Budgeting & Auditing: Leverage Pipefy for Financial Control"
- IT: "Streamline IT Operations: Enhance Project Delivery with Pipefy"

### **Roundtables and Panels:**

We could host virtual roundtables or panel discussions where industry leaders debate about pressing issues in their verticals and how technology, especially Pipefy, can be a game-changer.

### Product Demonstrations and Q&A Sessions:

These can offer a 'behind-the-scenes' look at Pipefy, showcasing how it can address the specific needs of each vertical. Interactive Q&A sessions can help address concerns and objections, moving prospects further down the funnel.

### Virtual Networking Events:

These events can be centered around a theme relevant to each vertical and provide an opportunity for professionals to connect, discuss, and learn. It can subtly boost Pipefy's brand visibility and credibility.

### Promotion and Follow-up:

Each of these events will be promoted through our **email marketing, LinkedIn campaigns, and on industry-specific platforms** to ensure maximum attendance. Post-event, attendees will be segmented based on their interaction and follow-up sequences will be sent to nurture them into the next step of the sales process.

To ensure that our events are hitting the mark, we'll measure success through metrics such as number of attendees, engagement during the event (like questions asked), and conversions post-event (like demos scheduled or content downloaded).

### Effort and Cost: Webinar

Let's consider a webinar, for instance. The required effort and costs would include content development, guest speaker fees (if applicable), platform fees, promotional costs, and time spent by the team. Assuming we hold a monthly webinar, the costs could look something like this:

- Content Development: ~\$1,000 (includes research, scripting, and visual design)
- Guest Speaker Fee: ~\$2,000 (depends on industry rates)
- Webinar Platform Fee: ~\$100 (based on an average platform like Zoom)
- Promotional Costs (Email, LinkedIn Ads, etc.): ~\$2,000
- Team Time: ~40 hours (includes content creation, promotion, technical setup, and hosting)

### **Impact and ROI:**

Now let's look at the potential impact and ROI. Assume that each webinar attracts around 200 attendees (based on industry averages for well-promoted events), with 25% expressing further interest in Pipefy (50 leads). If we have a conversion rate of 5% from leads to closed deals, we're looking at 2-3 new customers per webinar.

With an average ACV of \$15k, this implies a direct revenue impact of **\$30k - \$45k** per webinar. Hence, with an approximate cost of \$5,100 per webinar, the ROI is significant.

### **Multi-faceted Benefits:**

These calculations consider the direct impact, but remember, the benefits of webinars extend beyond immediate sales. They help to establish thought leadership, increase brand visibility, nurture existing leads, and generate valuable content that can be repurposed. All of these factors enhance the overall ROI.

### **Measurement and Optimization:**

We'll track key metrics like registration-to-attendee ratio, attendee engagement, number of qualified leads, and ultimately, sales conversion. A/B testing can be conducted on promotional materials and webinar content to continually enhance engagement and conversion rates.

In essence, webinars offer a multi-faceted tool to generate demand and foster a stronger sales-marketing alignment. The initial investment in planning and execution can yield significant returns in the form of new customers, thought leadership, and market positioning.

## Campaign Idea: "The Quest for Workflow Excellence"

**Objective:** To create an exclusive and prestigious outbound marketing campaign that engages enterprise companies by leveraging a narrative-driven approach with a sense of mystery and excitement.

### Campaign Overview:

**The Invitation:** Craft a personalized and intriguing invitation to selected enterprise prospects, reminiscent of an ancient scroll or a sealed envelope. The invitation should introduce the concept of "The Quest for Workflow Excellence" and extend an exclusive invitation to participate in a transformative journey.

**The Riddle:** Along with the invitation, include a cryptic riddle or puzzle that hints at the benefits and solutions Pipefy offers. The riddle will spark curiosity and encourage prospects to uncover the answers.

**Virtual Treasure Hunt:** Develop an interactive online experience where prospects embark on a virtual treasure hunt to discover the hidden secrets of optimal workflow management. Create a dedicated microsite or landing page that serves as the central hub for the quest.

**Clues and Challenges:** Present prospects with a series of challenges, puzzles, and questions related to workflow inefficiencies and pain points. Each successful completion unlocks the next clue, leading them closer to the ultimate solution—Pipefy.

**Gamified Progress Tracking:** Implement a gamification element that allows prospects to track their progress and compete with their peers. Offer rewards or recognition for those who reach specific milestones or complete the quest.

**Engaging Content:** Embed captivating videos, informative content, and testimonials from existing enterprise customers who have already discovered the power of Pipefy's solutions. The content should showcase real-world use cases and demonstrate how Pipefy can overcome workflow challenges.

**Executive Roundtable:** Host an exclusive virtual executive roundtable event, bringing together C-level executives from participating enterprise companies. The roundtable will provide a platform for thought leaders to share insights and best practices in workflow optimization. Pipefy's experts can moderate the discussion and offer valuable insights and solutions.

**Personalized Outreach:** Complement the virtual treasure hunt with personalized email outreach to each prospect, highlighting their progress, achievements, and the next steps in the quest. Use a narrative-driven approach that builds upon the mystery and excitement of the campaign.

**Mystery Content Series:** Create a series of thought-provoking and educational content pieces, such as whitepapers, eBooks, and case studies, that delve deeper into the challenges faced by

enterprise companies and how Pipefy's solutions provide the key to overcoming them. These content pieces can be released periodically throughout the campaign to maintain engagement.

**Social Media Teasers:** Generate buzz and anticipation by sharing teaser content and hints on social media platforms. Use cryptic messages, intriguing visuals, and short videos to pique curiosity and encourage prospects to join the quest.

**VIP Access:** Offer exclusive access to Pipefy's premium features and resources to prospects who complete the virtual treasure hunt and demonstrate their commitment to workflow excellence. This VIP access can include personalized consultations, advanced training sessions, or priority support.

**Measurement and Tracking:** Utilize analytics and tracking tools to monitor prospect engagement, conversion rates, and pipeline progression. Measure the effectiveness of the campaign by analyzing metrics such as completion rates of the virtual treasure hunt, attendance at the executive roundtable, and overall revenue generated from the targeted enterprise accounts.

### **Key Benefits:**

**Exclusivity and Prestige:** The campaign's narrative-driven approach and sense of mystery create an exclusive and prestigious aura around Pipefy's solutions, appealing to enterprise companies seeking innovative and transformative partners.

**Engagement and Personalization:** The interactive nature of the virtual treasure hunt and personalized outreach keep prospects engaged throughout their journey, fostering a deeper connection and understanding of Pipefy's value proposition.

Thought Leadership and Networking: The executive roundtable provides a platform for Pipefy to position itself as a thought leader in workflow optimization while facilitating networking opportunities among industry

## Cost Breakdown and Potential ROI Analysis:

### Campaign Development:

- Creative Concept and Design: \$10,000
- Landing Page and Microsite Development: \$5,000
- Content Creation (Videos, Riddles, Challenges): \$8,000
- Executive Roundtable Planning and Facilitation: \$7,000
- Total Campaign Development Cost: \$30,000

### Direct Mail and Invitations:

- Customized Invitations and Scrolls: \$5,000
- Printing and Mailing: \$4,000
- Total Direct Mail Cost: \$9,000

### Virtual Treasure Hunt and Online Experience:

- Microsite Hosting and Maintenance: \$2,000
- Gamification Platform Integration: \$3,000
- Content Creation for Clues and Challenges: \$6,000
- Total Online Experience Cost: \$11,000

#### Personalized Outreach:

- Email Marketing Platform: \$1,000
- Copywriting and Design: \$4,000
- Total Personalized Outreach Cost: \$5,000

#### Executive Roundtable:

- Event Hosting Platform: \$1,000
- Speaker Fees and Moderation: \$3,000
- Total Executive Roundtable Cost: \$4,000

#### Mystery Content Series:

- Content Creation and Design: \$3,000
- Total Mystery Content Series Cost: \$3,000

**Total Campaign Cost: \$62,000**

#### Potential ROI Analysis:

To estimate the potential ROI of the campaign, we will consider the average deal size, conversion rates, and the number of targeted prospects. Let's assume the following:

Average Deal Size (ACV): \$15,000

Conversion Rate from Campaign Engagement to Closed-Won: 10%

Number of Targeted Prospects: 100

#### Potential Revenue Generated:

- Number of Closed-Won Deals: 10 (100 prospects x 10% conversion rate)
- Total Potential Revenue: \$150,000 (10 deals x \$15,000 ACV)

#### ROI Calculation:

- $ROI = (Total\ Potential\ Revenue - Total\ Campaign\ Cost) / Total\ Campaign\ Cost$
- $ROI = (\$150,000 - \$62,000) / \$62,000$
- $ROI = 1.42$

The ROI for this campaign is approximately 1.42, indicating that for every dollar invested in the campaign, there is a potential return of \$1.42. This is below our ideal 1:3 return but there are multiple benefits around differentiation and larger brand impact that will contribute to additional revenue.

It's important to note that these ROI calculations are based on assumptions and estimates. The actual results may vary depending on the effectiveness of the campaign, market conditions, and the conversion rates achieved. Regular monitoring, tracking, and optimization of the campaign will be crucial to maximize ROI and drive success.

## Budget Allocation: Outbound Activities

To effectively allocate the available budget of \$500,000 across outbound activities, we will prioritize the channels and tactics that have the highest potential for reaching and engaging our target audience, driving lead generation, and ultimately hitting our net new MRR goal. Here's a

breakdown of the budget allocation for each outbound activity, considering both the US and Brazil markets:

Direct Mail:

- US Budget: \$100,000
- Brazil Budget: \$40,000

Event Sponsorships:

- US Budget: \$80,000
- Brazil Budget: \$20,000

Webinars:

- US Budget: \$70,000
- Brazil Budget: \$15,000

Industry-Specific Publications:

- US Budget: \$33,000
- Brazil Budget: \$10,000

"Quest for Workflow Excellence" Campaign:

- US Budget: \$62,000

Paid Social Ads (Targeted towards existing database):

- US Budget: \$50,000
- Brazil Budget: \$20,000

By allocating the budget in this manner, we maintain a strategic focus on the US market with a larger budget allocation to support our expansion efforts. The US market presents significant

growth potential and a larger target audience. Brazil, being our base of operations, also receives a considerable allocation to sustain our market presence and ongoing initiatives.

Please note that these budget allocations are subject to adjustment based on evolving market conditions, campaign performance, and the need for flexibility to seize emerging opportunities. Regular monitoring, analysis, and optimization of each outbound activity will be crucial to ensure the effective utilization of the allocated budget and maximize the potential ROI in both the US and Brazil markets.

## Potential Return

To simulate the potential net new revenue generated from the allocated budget, we will consider the goal of acquiring 36 new clients with an Annual Contract Value (ACV) of \$15,000 per client. Additionally, we will take into account the blended Customer Acquisition Cost (CAC) of \$13,888. Based on the budget allocation, here's a breakdown of the simulation for each outbound activity:

### Direct Mail:

- Total Budget: \$140,000 (US: \$100,000, Brazil: \$40,000)
- Estimated Conversion Rate: 1%
- Number of New Clients: 14
- Net New Revenue: \$210,000

### Event Sponsorships:

- Total Budget: \$100,000 (US: \$80,000, Brazil: \$20,000)
- Estimated Conversion Rate: 2%

- Number of New Clients: 8
- Net New Revenue: \$120,000

#### Webinars:

- Total Budget: \$85,000 (US: \$70,000, Brazil: \$15,000)
- Estimated Conversion Rate: 3%
- Number of New Clients: 9
- Net New Revenue: \$135,000

#### Industry-Specific Publications:

- Total Budget: \$43,000 (US: \$33,000, Brazil: \$10,000)
- Estimated Conversion Rate: 0.5%
- Number of New Clients: 2
- Net New Revenue: \$30,000

#### "Quest for Workflow Excellence" Campaign:

- Total Budget: \$62,000
- Estimated Conversion Rate: 2.5%
- Number of New Clients: 6
- Net New Revenue: \$90,000

#### Paid Social Ads (Targeted towards existing database):

- Total Budget: \$70,000 (US: \$50,000, Brazil: \$20,000)
- Estimated Conversion Rate: 1.5%
- Number of New Clients: 10

- Net New Revenue: \$150,000

Based on these simulations, the total net new revenue that can be generated from all these efforts amounts to \$735,000, which exceeds the goal of \$540,000. However, it's important to note that these are estimated conversions rates and results may vary based on factors such as campaign effectiveness, market conditions, and customer response. The blended CAC should also be considered to ensure the profitability of customer acquisition. Regular monitoring, analysis, and optimization of the campaigns will be crucial to ensure the desired outcomes and maximize the net new revenue generated.