



A leading Title Insurance company worked with DemandBlue to build an automated and customized attribution program

The client is a leading provider of title insurance and settlement services to the real estate and mortgage industries

Challenge

The client was not sure if their Marketing campaigns were yielding results. Their existing pipeline funnel reporting or opportunity landscape assessments were not projecting a clear picture of the ROI. They wanted to gain a deeper understanding of the effectiveness and impact of their lead nurturing efforts.

After hearing this challenge, and attending a number of cross-team brainstorming sessions, DemandBlue worked with the client to understand their business requirement and their existing Marketing and Sales strategies.

Solution

To ensure that the client's marketing email nurtures could be tracked, DemandBlue delivered and built a strategic roadmap to enhance the client's existing nurturing processes. The most important task was the initial need to standardize the use of Pardot and its integration with Salesforce, which helped to ensure that marketing nurtures could be accurately attributed to converted leads. This strategic shift recommended and implemented by DemandBlue included:

- Custom fields and field mapping
- Engagement Studio programs
- The buildout of Salesforce workflow actions and rules
- Segmentation rules and custom emailing
- Nurture mapping
- Reporting

Setup:

At the outset of the project, DemandBlue built a map of an ideal, full-funnel nurture program to fuel the client's marketing engine. This included both high performing nurtures already in place, and net new nurtures to fill the gaps in the client's efforts to push leads through the buyer's journey.

We then identified how to best tie the data from the nurture programs running in Pardot to Salesforce. To do this, DemandBlue recommended the creation some new fields that would map across Pardot and Salesforce. These milestone fields were created to capture the value in the "Current Nurture Status" field at the time a lead converts to the appropriate lifecycle stage.

Reporting and Tracking:

Once the technical set-up was complete, DemandBlue worked with the client to build custom reporting out of Salesforce. The goal was to ensure that the client had full visibility of the impact of marketing nurtures and campaigns on business results and progression of a lead's life cycle.

Benefits

- By optimizing the current nurture process and ensuring that existing nurtures could be mapped to leads in Salesforce, the client was able to successfully track the leads
- The custom fields created in Pardot enabled their marketing team to better track a customer throughout the funnel, assigning them a status that would change with each step in the customer journey
- Finally, we set up a Salesforce report that could easily provide the client with better understanding of the impact of their marketing campaigns on business
- With insight into how their nurturing efforts are impacting the bottom line, the client is enabled to make data-based adjustments to their marketing mix, messaging and goals