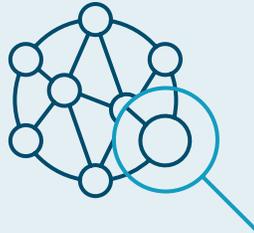




Harnessing Data Helps Prioritize Sales Outreach Efforts

A Deeper Understanding of Accounts at NI



Informed sales plays can be invaluable, helping a good sales team become great.

NI develops automated test and automated measurement systems that help engineers and enterprises solve the world's toughest challenges. Through all phases of the product development cycle, NI's tailored, software-connected approach helps make visions a reality for their customers across diverse industries including semiconductor, automotive, aerospace and defense, electronics, energy, and academic and research. NI anchors on its core values to "Be Bold, Be Kind, and Be Connectors" while challenging the world to "Engineer Ambitiously."

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PRIORITIZING AND OPTIMIZING OUTREACH EFFORTS

Joe Quinn, Director of High Touch Demand at NI, describes his professional role in a mere 15 words: “I bring clarity to the unclear, defining strategies that drive business results while supporting others.” At NI, data is behind the clarity Joe brings, and it helps build efficiencies—driving more strategic sales plays.

In sales, prioritizing outreach can be a bit of a juggling act. Account insights are key to understanding where to focus a sales team’s efforts and which interactions are going to be the most productive toward getting a sale. But insights can be lacking, which creates inefficiencies in the sales process. Although good sales reps have their finger on the pulse of their accounts, they deserve more knowledge.

Providing sales reps with a deeper understanding of prospects within their accounts to help prioritize opportunities is key to smarter lead management. Some call it “striking while the iron is hot,” but you need to know when that is. You need to understand account intent and engagement to know if and when the need is there and the timing is right. It’s even better when you have the tools that make it easier to reach out at the right time, with the right message, across relevant platforms.

“Our sales team is already expert at knowing the accounts to be working with. My team’s objective is to provide additional insights—for example, who is showing interest and purchasing intent, and in what areas. This helps our sales reps hone their strategies, whether it’s a new sales play, a cross-sell, or an upsell opportunity,” explains Joe.

SERVING SMARTER SALES PLAYS

Time is precious—and salespeople have a limited amount of it in order to hit their numbers. Should they spend their time with a book of accounts or focus their efforts on the five with the highest likelihood of closing a deal? How do they know who those five are? By observing first- and third-party buyer intent signals and seeing how prospects and clients interact with NI, marketing can serve relevant sales plays to its sales team. These sales plays help reps focus on certain activities within an identified time period, to optimize conversion and deals so they can prioritize their effort where and when it’s most likely to pay off.

With so many data points flowing into an organization, plus the firsthand knowledge and expertise that sales reps possess of their accounts, it can be hard to determine where to start or when to engage. Informed sales plays can be invaluable, helping a good sales team become great.

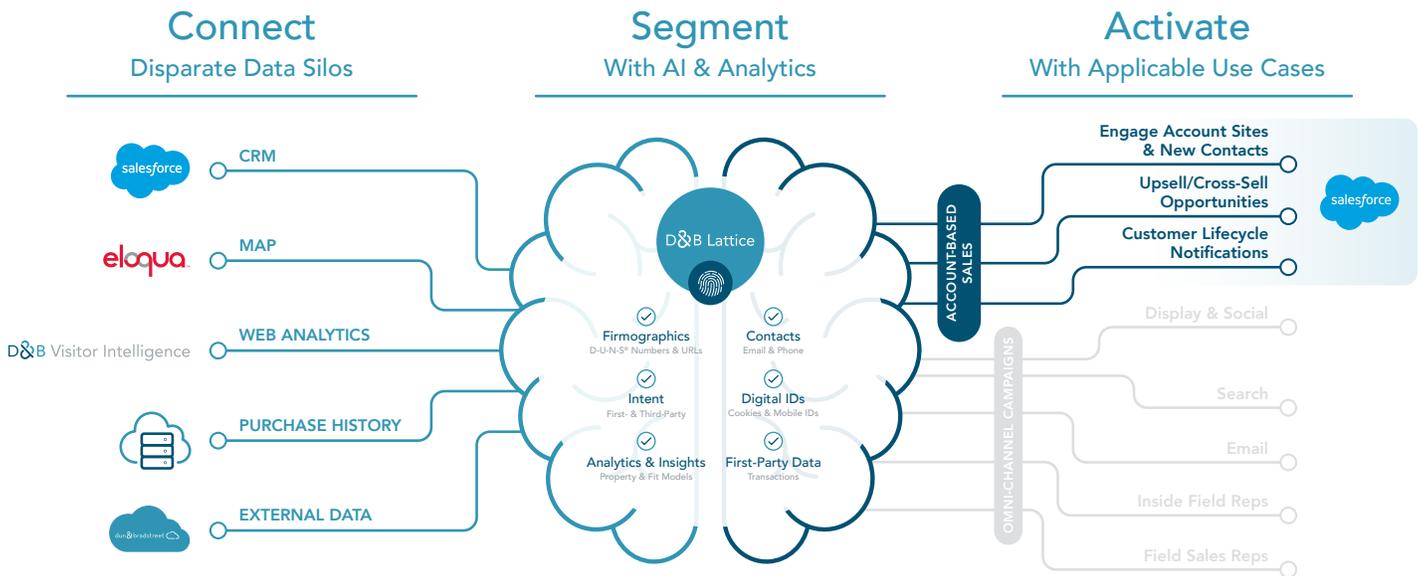


Figure 1: D&B Lattice implementation at NI.

D&B Lattice combines buying signals from disparate applications throughout the organization. This includes considering first- and third-party intent along with other account factors such as past revenue, future revenue potential, platform fit, and more. To support campaign efforts, drive better cross-functional alignment, and obtain a stronger ROI, the marketing team activates these insights with targeted, personalized sales plays in Salesforce based on high-fit, in-market segments. These insights are delivered in Salesforce along with seller enablement for account manager activation and account buying history by product line.

As of December 2020, NI has hundreds of sellers engaging with various in-market plays built to target prospects or expand existing relationships. Mark Walters, Principal Marketing Operations Manager, adds, “We are able to help sellers proactively go after the areas where we feel we have the highest confidence that we’ll be able to convert.”

NI also uses the **Dun & Bradstreet D-U-N-S® Number** to connect various data silos spread throughout the organization, providing a clearer view of prospects and customers. **D&B Optimizer for Marketing** connects contact data to company data. The team can then segment to identify ideal prospects and impact audiences using artificial intelligence and Dun & Bradstreet data.

A BEST-PRACTICE ROLLOUT

NI took a phased approach in rolling out the sales play concept to sales teams, eventually expanding across all business units and geographies. As Joe is quick to point out, “Rolling out a game changing technology involves more than just the implementation. Behavioral shifts were also critical to build a shared fate across the organization—cross-collaboration is important.”

He continues, “We took feedback from sales management to position this as a solution that could be used to be more efficient and effective with their expectation of prospecting at accounts. This alignment was important.”



Partnership across the organization is key. Joe’s team partners with sales leaders for driving adoption of the sales plays through contests (sales reps thrive on competition!), securing internal success stories, and driving one-on-one engagements.

But the internal partnerships don’t stop there. “This isn’t a siloed effort. It requires collaboration and alignment across the organization. That’s really key to success,” Joe said. “This is a group effort with many pieces: high-touch demand, demand strategy, IT, sales enablement, field marketing, our campaign managers, inside sales development engineers, account managers and sales leadership.

PILOT PROGRAM HIGHLIGHTS

NI has been thoughtful and strategic in their D&B Lattice implementation as they’ve built out sales plays and

launched the solution to their sales organization. The strategy continues to gain momentum across their global markets, and NI is looking forward to evolving the program further into 2021.

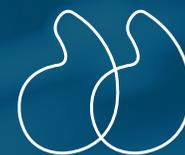
“The Dun & Bradstreet team has been very collaborative—consulting with us on best practices and providing advice on what else we can be doing. Their partnership has helped us understand approaches to implement and best-practices to follow so we can continue to see improvements in our deployment,” Mark points out.

There were additional benefits, too. As Joe observes, “By adopting an industry-leading tool, not only did we modernize our marketing, but we also provided our employees with an opportunity for professional development: learning a new tool, third-party intent, workflows, and aligning with sellers.”

Date	 Sales accepted recommendations*	 Recommendations that converted to opportunities*	 Marketing created and influenced pipeline*
July 1, 2020	300	7	\$400K
October 1, 2020	800	46	\$1.7M
January 1, 2021	1,300	66	\$2.7M

* Results are cumulative

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Mark Walters, Principal Marketing Operations Manager, NI

BEST PRACTICES FOR SUCCESS

The pilot program has helped Joe, Mark, and their teams learn what has worked, and what hasn't, when rolling out an implementation that can change the way people approach their job. Key learnings include:

Build internal campaigns.

To increase adoption and engagement NI created sales advocate videos, presented in sales team meetings, and had an incentive program.

Listen, then respond.

NI captured feedback from sales leaders and reps. This helped Joe's team tailor positioning, building usage and engagement.

Align to Sellers.

Align the program to sellers' motions. NI used the D&B Lattice recommendations to help sellers fulfill the requirement that they prospect at their accounts.

Elevate wins.

NI has created advocates and champions.

Communicate often.

NI reports weekly on progress and best practices, and regularly highlights internal successes. This builds momentum.

Contests add fun!

To increase adoption, NI held a drawing for sellers who opened, acted, and closed recommendations.

Collaborate!

Cross-collaboration builds consensus and avoids the feeling that solutions are being pushed from one team to another.

Celebrate.

NI celebrates benchmarks such as its first \$1 million and then \$2 million in marketing created or influenced opportunities.

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