

Openprise provides granular campaign reporting and advanced attribution modeling while supporting Clari's long-term vision for data-driven decisions



Results

- ✓ Replaced two point solutions at \$80k cost saving while adding increased functionality and flexibility
- ✓ Improved visibility into campaign efficiency through custom attribution modeling
- ✓ Reduced cost of marketing automation contract through deduplication
- ✓ Increased campaign conversion through improved targeting

The growth operations team at Clari, a revenue collaboration and governance software provider, relies on sophisticated attribution models to maximize ROI across its go-to-market motions. The models are only as good as their underlying data. Unfortunately, the team was having trouble syncing key campaign data to its Salesforce CRM system, which called into question the reliability of the entire program. Once the data quality and integration issues were solved and processes automated, the Clari team moved quickly to add more advanced projects to Openprise, like generating the attribution models themselves. Each point solution that Openprise can replace or improve increases the value of Clari's return. Through their utilization of Openprise, the team has already saved hundreds of thousands of dollars. Clari is now looking to increase those savings through expansion into new areas including deduplication and lead routing.

Unreliable integration limited control

While the main operational challenge Clari faced wasn't unique, it was far from trivial and impacted the team's ability to reliably use its data downstream. Like many companies, Clari has separate systems for CRM and marketing automation, and the ops team

struggled with getting campaign-level data like UTM query parameters from Marketo into the right objects in Salesforce. Instead of building a custom flow with Apex code, the team relied on a point integration solution to do the heavy lifting of matching the campaign metadata and appending it to the right person record. The solution, however, wasn't working; in the words of Clari team lead and Director of Growth Operations Conrad Millen, "It would always break, and we had no control."

Granular tracking provides extra clean funnel reporting

UTMs (or urchin tracking models) are the bits of alphanumeric text that the originating platform (typically an ad or email service like Google) automatically appends to a URL on click-through. When used correctly, UTMs provide the advertiser or content producer with valuable, contextual information about the end user and their interactions with the content, like the campaign name, source, medium, CRM campaign ID, or keywords searched. This data is critically important to generating and maintaining accurate marketing analytics and reporting, especially as it relates to campaign attribution. Instead of manually connecting the UTM contact and account like the

previous point solution vendor did, Openprise uses a webhook to automatically capture the data and bring it into Clari's system. Once there, a series of automated Openprise jobs are triggered that, as Conrad said, "do all these crazy things: Openprise finds the right contact, campaign, and form ID. Then they append the UTM values directly to the campaign lead record." The end result gives Conrad and his team "extremely clean and amazing" marketing funnel reporting, which allows them to do things like pull all of their qualified leads by the UTM values and analyze everything from marketing attribution to channel source and marketing program performance. The Clari team has also been impressed by the strength and scalability of the Openprise RevOps Data Automation Cloud. "Openprise does all the matching and writing to the campaign record, with a very strong infrastructure for scaling. We can ingest thousands of form-fills, and it will still operate the same way," Conrad enthused.

Custom attribution models improve targeting

Clari also replaced its rigid, limiting attribution point solution with the flexible, scalable Openprise RDA Cloud. Conrad and his team were quickly building multiple custom jobs with the Openprise attribution solution, which is highly configurable right out of the box. Within weeks,

the team was able to construct three attribution models that feed directly into their custom objects in Salesforce. The initial models distribute the opportunity amount equally across the interactions and are rolled up into the reporting, giving him the baseline metrics to set his targets and evaluate campaign performance. Because they can now look at all interactions across the "buying committee," Conrad knows what channels to prioritize and which assets to promote for each specific audience or persona. For example, the team recently discovered that finance roles were much more instrumental in opportunity conversion than expected and has since "kicked off more programs to target the finance persona."

New data-driven initiatives "powerful for the business"

Now that Conrad and his team have the baseline set, they're looking to expand their attribution modeling into post-sale interactions and other untapped areas of the sales cycle. With the flexibility and extensibility of the RDA Cloud, Clari is also planning to make broader use of the platform, especially in other areas like data quality and lead routing. Although new to Clari as a whole, Openprise had been on Conrad's radar for a while. Solving the challenges around UTM mapping and campaign attribution was just the tip of the iceberg. To Conrad, Openprise is

the perfect RevOps cloud platform to complement and support his data-centric vision for Clari. In addition to removing duplicative point solutions and the attached tech debt, the Openprise RDA Cloud provides him with the core capabilities—including back-end orchestration and the ability to uncover account signals—that he needs to identify trends, make better decisions, and put budget and resources toward initiatives that will return the greatest value.

"Openprise is heavily ingrained into our tech stack and is very powerful for the business. It allows us to be data-driven when it comes to making decisions and leveraging the spend and resources toward patterns of success, and unlocking potential that we historically haven't been able to see."

Conrad Miller,
Clari Director of Growth Operations

About Openprise

Openprise is a leader in Revenue Operations Data Automation, helping companies accelerate their funnel conversion and drive efficient revenue growth. We pioneered the first end-to-end, no-code RevOps Data Automation Cloud to enable even non-programmers to leverage customer data and automate processes. Leading enterprises depend on Openprise to increase conversion, accelerate funnel velocity, and drive funnel transparency and predictable revenue. To learn more visit www.openprisetech.com and follow us on LinkedIn, Twitter and Facebook.

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