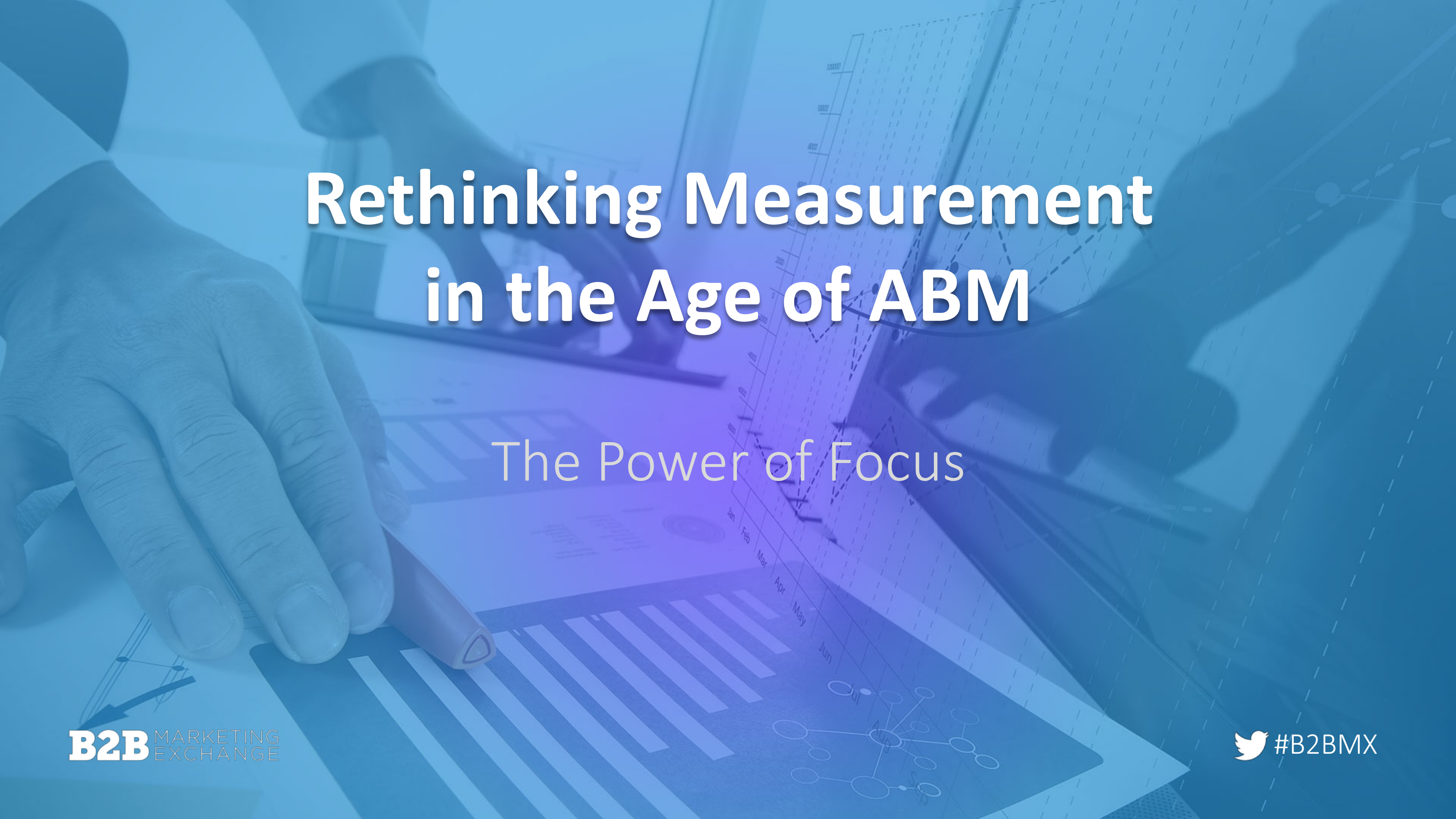

Rethinking Measurement in the Age of ABM

The Power of Focus

B2B MARKETING EXCHANGE

#B2BMX

Your Presenters

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- Naomi Marr
- **Imprivata**
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- **Imprivata**
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- merwich@imprivata.com

Imprivata Company Overview

6M
care providers

1900+
global healthcare customers

45
countries

Industry Leadership

- 35+ patents issued to-date
- 2019 KLAS SSO Leader
- 2018 Frost & Sullivan Technology Award

Company Information

- Founded 2002
- Offices in US, UK, and Australia
- 450+ employees worldwide

KLAS
CATEGORY LEADER
SINGLE SIGN-ON
2019

FROST & SULLIVAN
2018 BEST PRACTICES AWARD
NORTH AMERICAN DIGITAL HEALTH CYBERSECURITY TECHNOLOGY LEADERSHIP AWARD

The Boston Globe
TOP PLACES TO WORK
2017

TOP PLACE TO WORK
RECOGNIZED
BECKER'S HOSPITAL REVIEW
-2018-

Modern Healthcare
BEST PLACES TO WORK

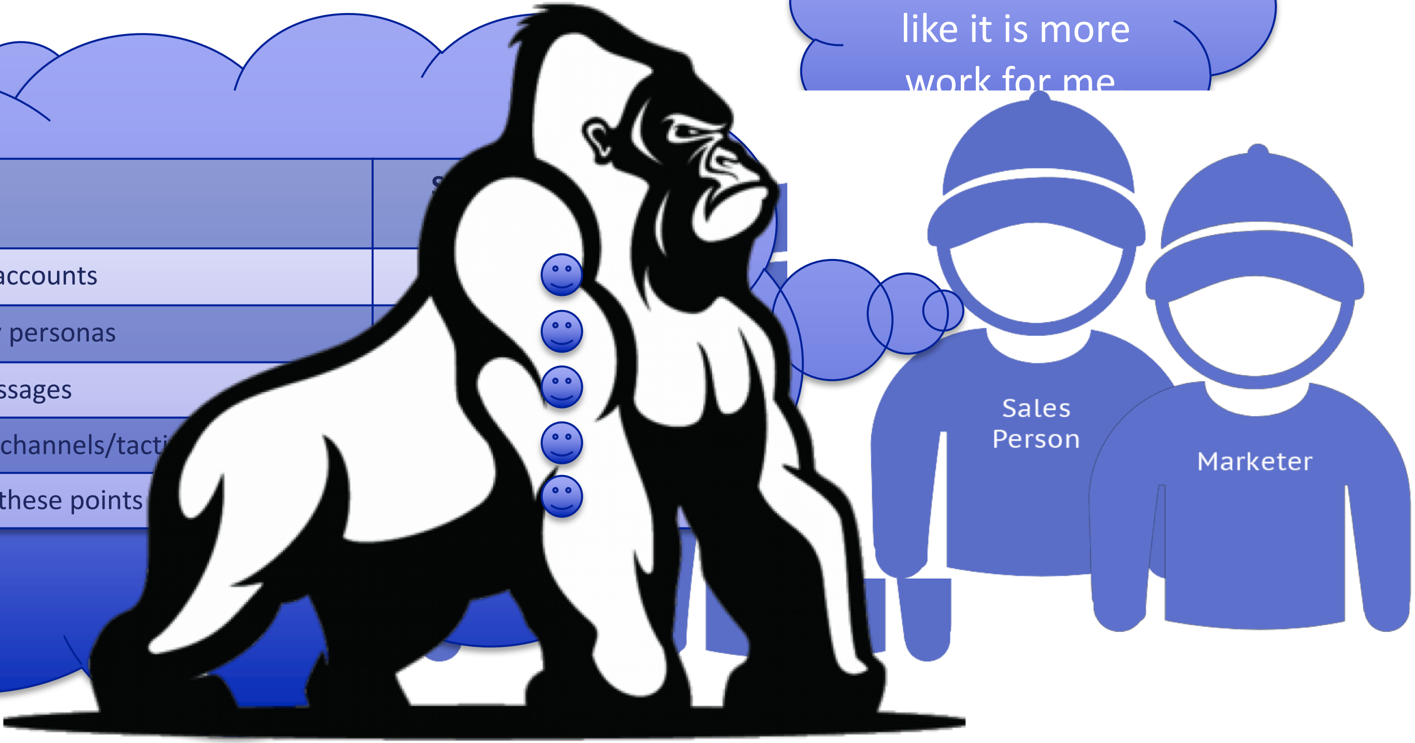
healthcare informatics 100

Benefits of Alignment Focus

ABM sounds complex – and like it is more work for me

Is A

Strategy
Market to these accounts
Include these key personas
Deliver these messages
Engage via these channels/tacti
Communicate at these points



Path to ABM Success

Sales Collaboration

- SVP Sales
- Sales Ops
- Marketing

Resources and Timing

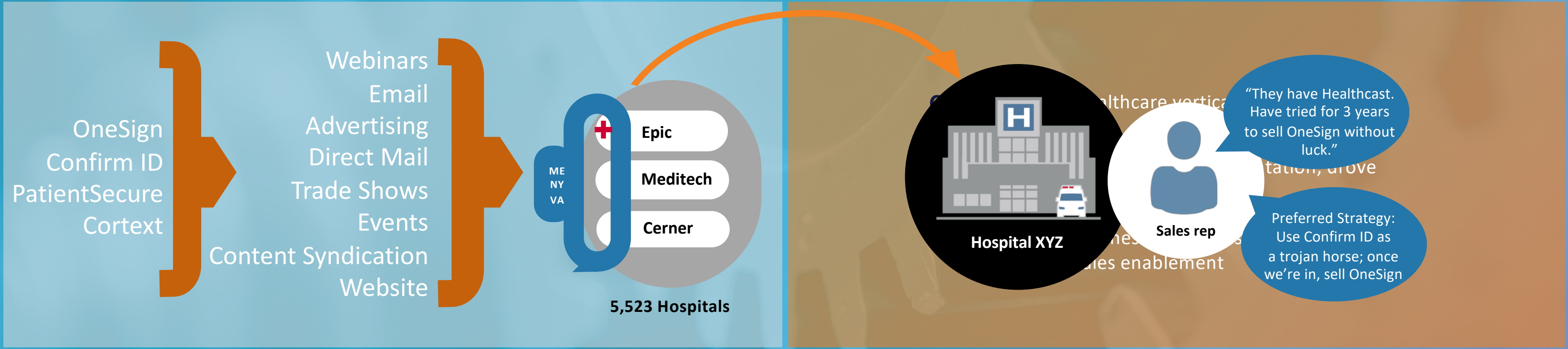
- 6-8 months
- IT, Sales, Marketing, Operations

Technology Infrastructure

- Automated vs. Manual
- Process drives features

Measurement Considerations

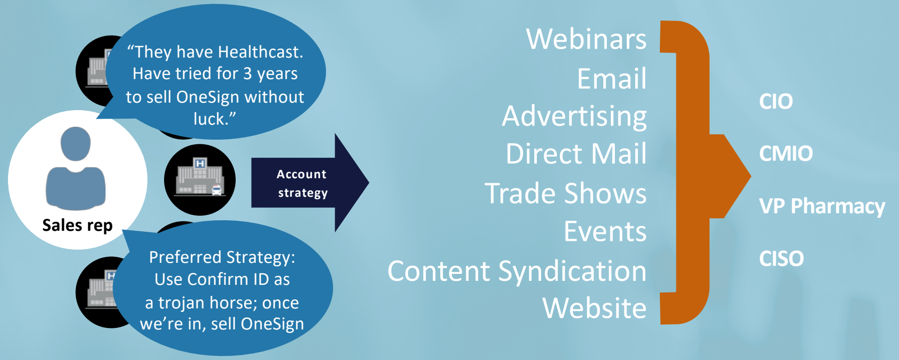
- During Rollout
- Continued ABM Specialist Support



OneSign
Confirm ID
PatientSecure
Cortext
Webinars
Email
Advertising
Direct Mail
Trade Shows
Events
Content Syndication
Website
ME
NY
VA
Epic
Meditech
Cerner
5,523 Hospitals
Hospital XYZ
Sales rep
lthcare vertica
tation, drove
nes
ales enablement

“They have Healthcast. Have tried for 3 years to sell OneSign without luck.”

Preferred Strategy: Use Confirm ID as a trojan horse; once we’re in, sell OneSign



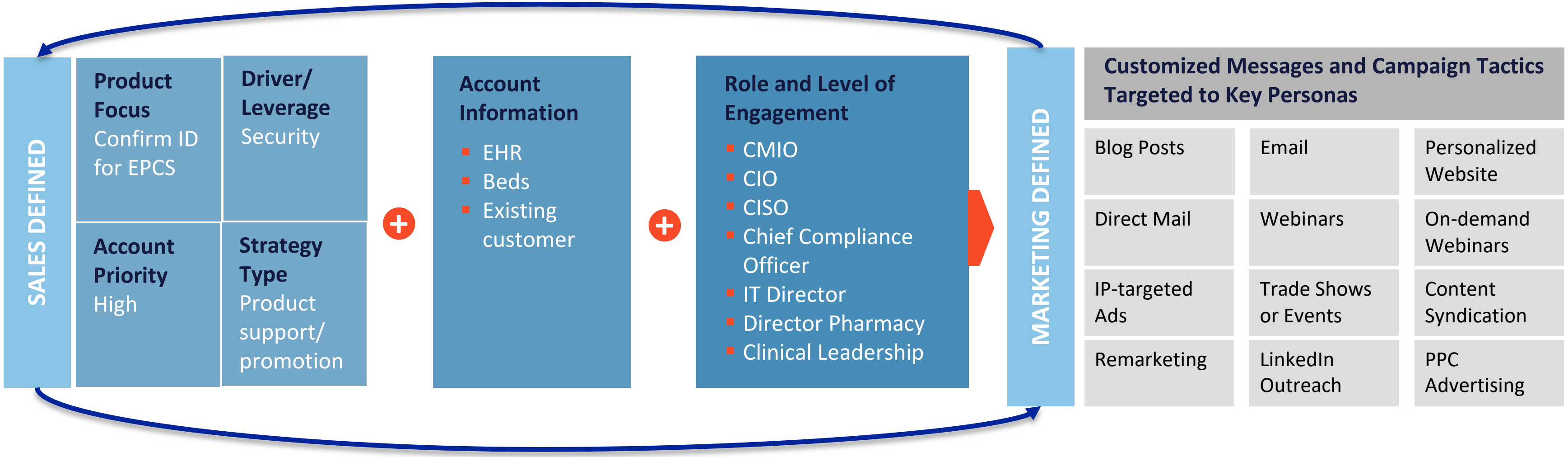
"They have Healthcast. Have tried for 3 years to sell OneSign without luck."
Sales rep
Account strategy
Preferred Strategy: Use Confirm ID as a trojan horse; once we're in, sell OneSign
Webinars
Email
Advertising
Direct Mail
Trade Shows
Events
Content Syndication
Website
CIO
CMIO
VP Pharmacy
CISO

Change: Healthcare segment to accounts and buying groups

Impact: Hyper-segmentation, Demand Unit Waterfall™, drove messaging

Alignment: Account sales enablement

Account Information Drives Strategy



SALES DEFINED

Product Focus
Confirm ID for EPCS

Driver/ Leverage
Security

Account Priority
High

Strategy Type
Product support/ promotion

+

Account Information

- EHR
- Beds
- Existing customer

+

Role and Level of Engagement

- CMIO
- CIO
- CISO
- Chief Compliance Officer
- IT Director
- Director Pharmacy
- Clinical Leadership

MARKETING DEFINED

Customized Messages and Campaign Tactics Targeted to Key Personas

Blog Posts	Email	Personalized Website
Direct Mail	Webinars	On-demand Webinars
IP-targeted Ads	Trade Shows or Events	Content Syndication
Remarketing	LinkedIn Outreach	PPC Advertising

Buyer Personas/Groups by Product

	VP Revenue Cycle	CIO	CISO	CMO	Chief Nursing Officer	Patient Safety Officer	Dir. Patient Access	IT Director	Director of Pharmacy	Biomedical Engineer	Chief Compliance Officer	HIM Director	CMIO
Imprivata PatientSecure				🧩	🧩		🧩		🧩				
Imprivata OneSign	🧩					🧩				🧩		🧩	
Imprivata Cortext			🧩	🧩		🧩			🧩				🧩
Imprivata Confirm ID		🧩			🧩		🧩			🧩		🧩	
Imprivata Identity Governance		🧩		🧩					🧩		🧩		

Sample Marketing/Sales Program

WEEK 1	WEEK 3	WEEK 5	WEEK 7	WEEK 9	WEEK 11	WEEK 13	WEEK 15	WEEK 17
Email #1 Opioid Crisis Introduction IP-Targeted Banner Ads & PPC Geo-target Ads Benchmarks Set	**Email #2** EPCS Overview Video IP-Targeted Banner Ads & PPC Geo-target Ads Analyze Intent Data for Sales Data Mining/ Segmentation	**Email #3** EPCS On-demand Webinar Direct Mail - Case Studies IP-Targeted Banner Ads & PPC Geo-target Ads Data Mining/ Segmentation	**Email #4** White Paper - Auditable Chain of Trust Sales Rep Follow-up to DM LinkedIn Outreach IP-Targeted Banner Ads & PPC Geo-target Ads Data Mining/ Segmentation	**Email #5** Analyst Report - EPCS Misconceptions Direct Mail - Key Personas Analyze Intent Data for Sales IP-Targeted Banner Ads & PPC Geo-target Ads Data Mining/ Segmentation	**Email #5** Resend to Non-opens Sales Rep Follow-up to DM LinkedIn Outreach IP-Targeted Banner Ads & PPC Geo-target Ads Data Mining/ Segmentation	**Email #7** Benefits of EPCS Page Gift DM Sales Outreach Email IP-Targeted Banner Ads & PPC Geo-target Ads Data Mining/ Segmentation	**Email #8** EPCS On-demand Webinar Direct Mail - Video Mailer IP-Targeted Banner Ads & PPC Geo-target Ads Data Mining/ Segmentation	**Email #9** Demo Request Call to Action Sales Rep Follow-up to DM Measure Results Data Mining/ Segmentation

Focused Sales and Marketing

- ABM Account Reviews
    - Activity reporting
    - Contact work
    - Persona management
    - Intent reporting
- Alignment with Programs
    - Persona confirmation
    - Sales follow-up

Importance of Technology Stack

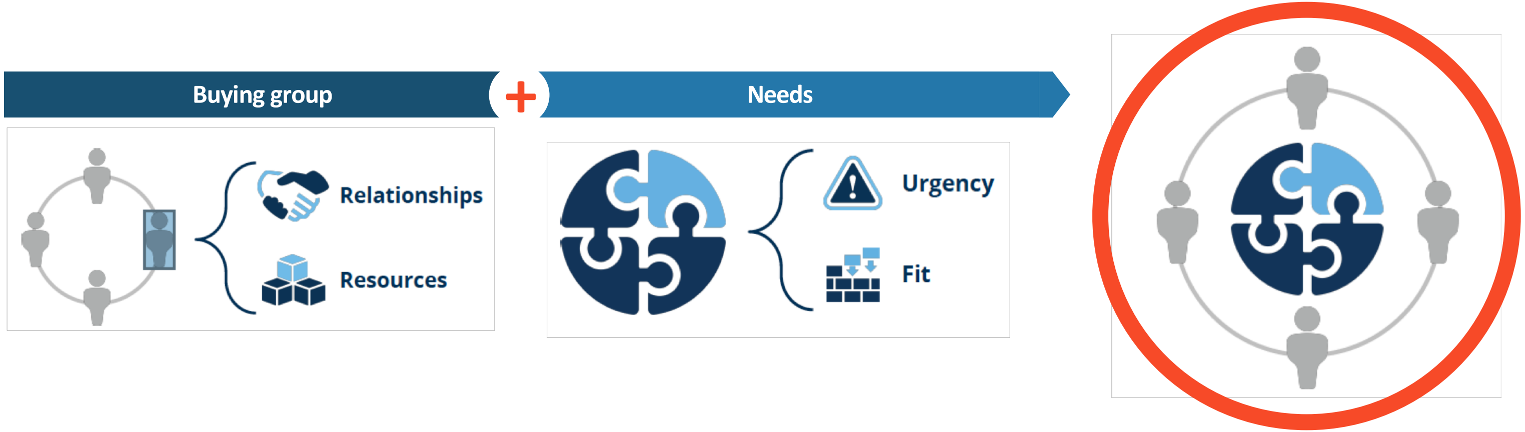
- Lead to account mapping
- Activity visibility
  - Marketing
  - Sales
  - ABM Specialists

- Campaign orchestration engine
  - Coordination of online & offline
- Scoring engine
- Persona mapping
- Data hygiene and augmentation
- Intent data modeling

- Targeted IP ad serving
- Website traffic mapping to accounts
- Personalized website experience
- Reporting
  - ABM vs. Non-ABM

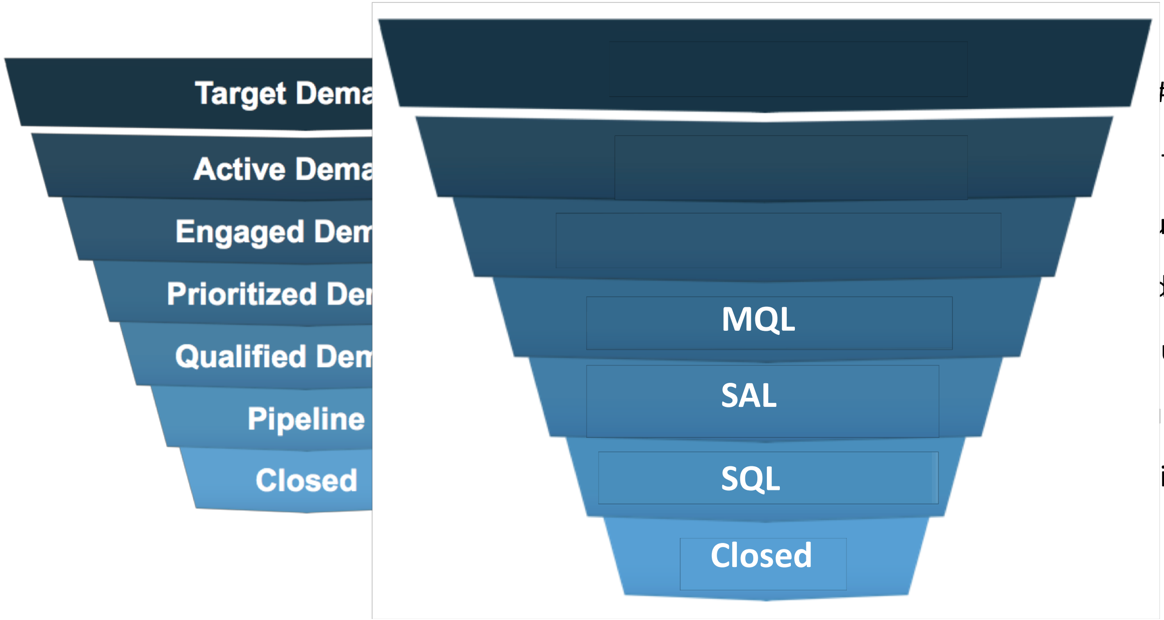
salesforce
DEMANDBASE
Drupal™ 8
Terminus
Google Analytics
trueInfluence
evergage®
Engagio
Hive9
DEMANDGEN®
Marketo™ An Adobe Company

Understanding the Model Changes


Buying group
+
Needs
Relationships
Resources
Urgency
Fit

Demand units are buying centers with needs that your solution fits

Demand Unit Waterfall


Target Dema
Active Dema
Engaged Dem
Prioritized De
Qualified Dem
Pipeline
Closed
MQL
SAL
SQL
Closed

product opportunities

ts showing intent

nits showing engagement (score 1-99)

units where score is > 100 (sales stage 0)

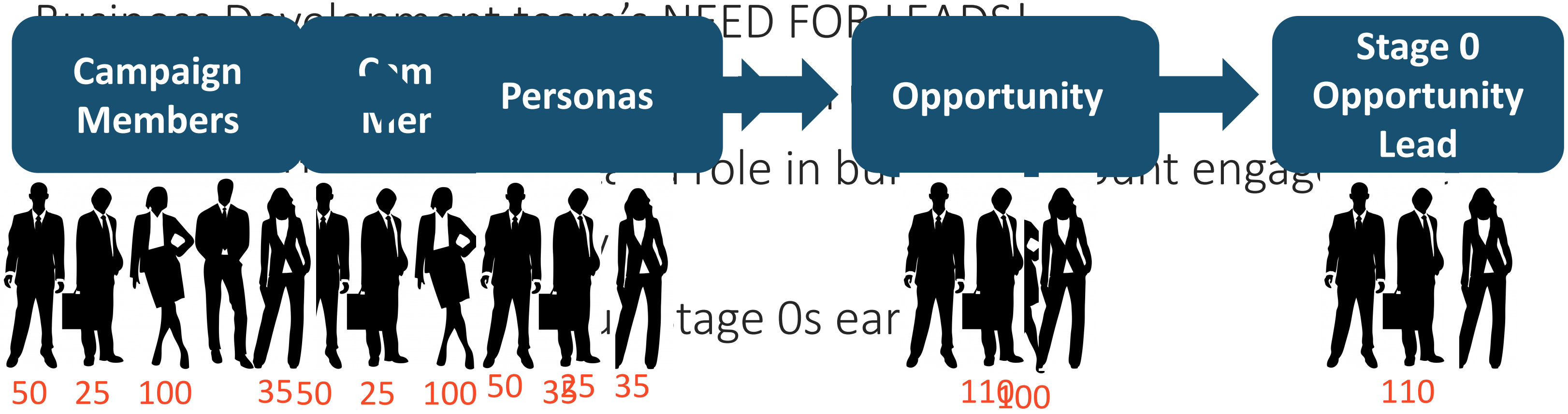
units in stages 1-3

nits in stages 4-6

its closed (won/lost)

Old World New World --> New World Impact

- Importance of activating key persona engagement
- Business Development team's NEED FOR LEADS!
- role in bu nt engag
- tage 0s ear


Campaign Members
Com Mer
Personas
Opportunity
Stage 0 Opportunity Lead
50
25
100
35
50
25
100
50
35
25
35
110
100
110

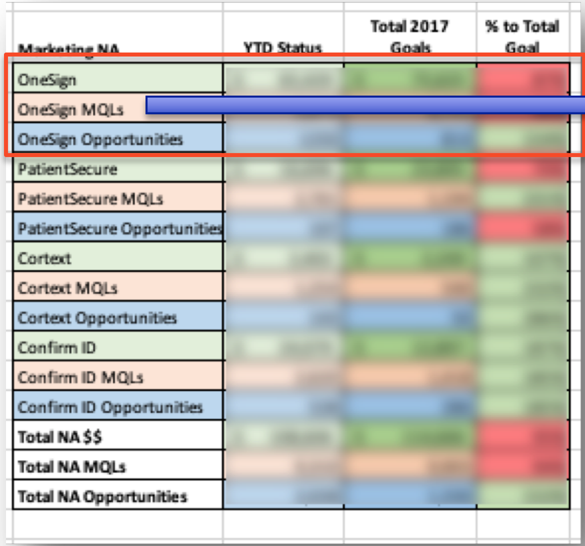
Modeling a New Marketing Business

- Impact on Demand Generation re: the role of the persona
  - Multiple CIOs in a hospital hierarchy
- Struggled with estimating how many MQLs = 1 Demand Unit (Opportunity)
- 8-10 month effort without results
  - Had to build out all new reporting methodology
  - Long sales cycle means we have to wait for results
  - Different metrics for shorter-term results
- Parent-Child Account hierarchy with independent purchasing decisions dramatically complicates model

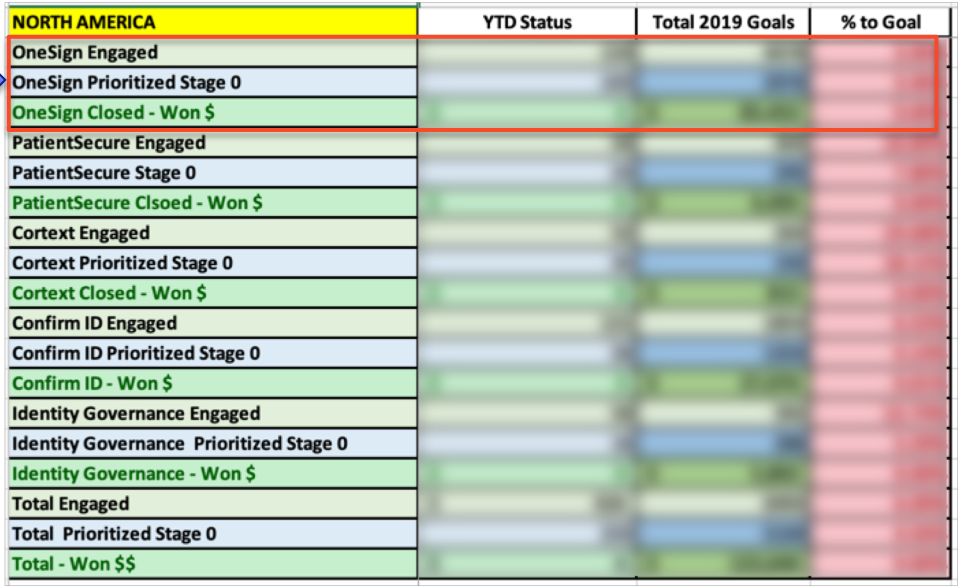
Reporting Framework

Audience	Pipeline generation health	Sales follow-up rigor	Pipeline velocity	Sales ability to leverage ABM	Persona coverage	ABM business impact	ABM strategy alignment	Campaign ROI
Executive Staff	X		X			X		
Marketing Executives	X	X	X			X		X
Demand Generation	X					X		X
ABM Specialists					X	X	X	
SVP Sales	X	X	X			X		
RVP Sales	X	X	X	X				

Old vs. New Report Out



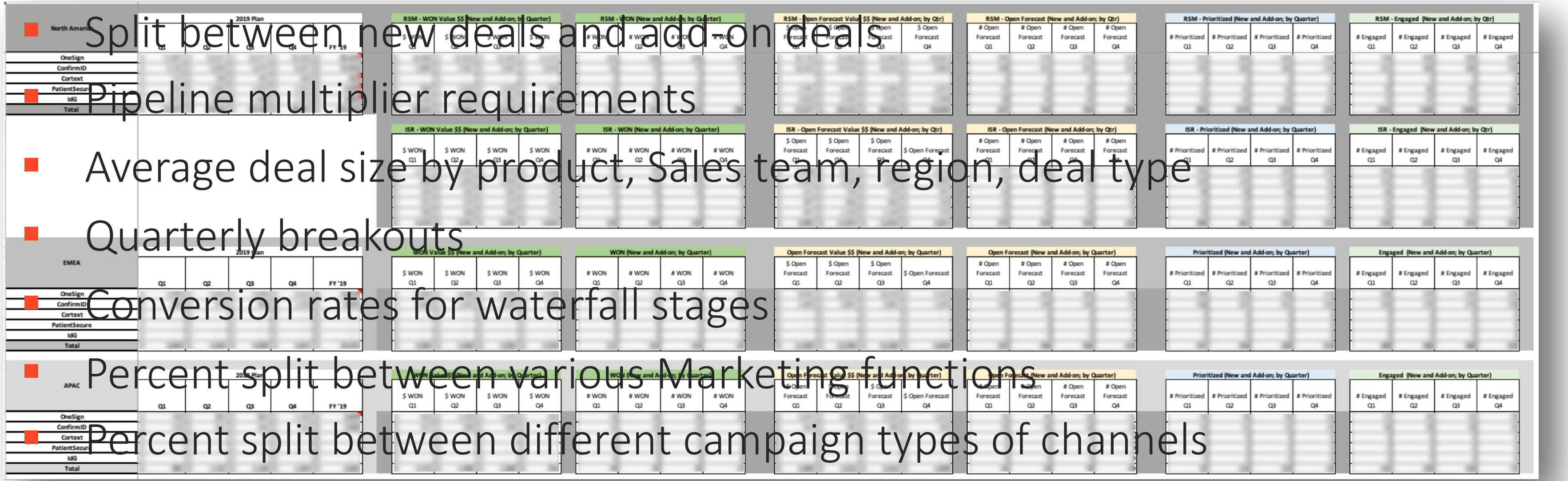
Marketing NA	YTD Status	Total 2017 Goals	% to Total Goal
OneSign	[redacted]	[redacted]	[redacted]
OneSign MQLs	[redacted]	[redacted]	[redacted]
OneSign Opportunities	[redacted]	[redacted]	[redacted]
PatientSecure	[redacted]	[redacted]	[redacted]
PatientSecure MQLs	[redacted]	[redacted]	[redacted]
PatientSecure Opportunities	[redacted]	[redacted]	[redacted]
Cortext	[redacted]	[redacted]	[redacted]
Cortext MQLs	[redacted]	[redacted]	[redacted]
Cortext Opportunities	[redacted]	[redacted]	[redacted]
Confirm ID	[redacted]	[redacted]	[redacted]
Confirm ID MQLs	[redacted]	[redacted]	[redacted]
Confirm ID Opportunities	[redacted]	[redacted]	[redacted]
Total NA $$	[redacted]	[redacted]	[redacted]
Total NA MQLs	[redacted]	[redacted]	[redacted]
Total NA Opportunities	[redacted]	[redacted]	[redacted]



NORTH AMERICA	YTD Status	Total 2019 Goals	% to Goal
OneSign Engaged	[redacted]	[redacted]	[redacted]
OneSign Prioritized Stage 0	[redacted]	[redacted]	[redacted]
OneSign Closed - Won $	[redacted]	[redacted]	[redacted]
PatientSecure Engaged	[redacted]	[redacted]	[redacted]
PatientSecure Stage 0	[redacted]	[redacted]	[redacted]
PatientSecure Clsoed - Won $	[redacted]	[redacted]	[redacted]
Cortext Engaged	[redacted]	[redacted]	[redacted]
Cortext Prioritized Stage 0	[redacted]	[redacted]	[redacted]
Cortext Closed - Won $	[redacted]	[redacted]	[redacted]
Confirm ID Engaged	[redacted]	[redacted]	[redacted]
Confirm ID Prioritized Stage 0	[redacted]	[redacted]	[redacted]
Confirm ID - Won $	[redacted]	[redacted]	[redacted]
Identity Governance Engaged	[redacted]	[redacted]	[redacted]
Identity Governance Prioritized Stage 0	[redacted]	[redacted]	[redacted]
Identity Governance - Won $	[redacted]	[redacted]	[redacted]
Total Engaged	[redacted]	[redacted]	[redacted]
Total Prioritized Stage 0	[redacted]	[redacted]	[redacted]
Total - Won $$	[redacted]	[redacted]	[redacted]

Backing Out From Bookings Goals

- Split between Inside and Outside Sales teams
- Split between new deals and add-on deals
- Pipeline multiplier requirements
- Average deal size by product, Sales team, region, deal type
- Quarterly breakouts
- Conversion rates for waterfall stages
- Percent split between various Marketing functions
- Percent split between different campaign types of channels



North America

2019 Plan: Q1, Q2, Q3, Q4, FY '19

OneSign
ConfirmID
Cortext
PatientSecure
IdG
Total

RSM - WON Value $$ (New and Add-on; by Quarter): $ WON Q1, $ WON Q2, $ WON Q3, $ WON Q4

RSM - WON (New and Add-on; by Quarter): # WON Q1, # WON Q2, # WON Q3, # WON Q4

RSM - Open Forecast Value $$ (New and Add-on; by Qtr): $ Open Forecast Q1, $ Open Forecast Q2, $ Open Forecast Q3, $ Open Forecast Q4

RSM - Open Forecast (New and Add-on; by Qtr): # Open Forecast Q1, # Open Forecast Q2, # Open Forecast Q3, # Open Forecast Q4

RSM - Prioritized (New and Add-on; by Quarter): # Prioritized Q1, # Prioritized Q2, # Prioritized Q3, # Prioritized Q4

RSM - Engaged (New and Add-on; by Qtr): # Engaged Q1, # Engaged Q2, # Engaged Q3, # Engaged Q4

ISR - WON Value $$ (New and Add-on; by Quarter): $ WON Q1, $ WON Q2, $ WON Q3, $ WON Q4

ISR - WON (New and Add-on; by Quarter): # WON Q1, # WON Q2, # WON Q3, # WON Q4

ISR - Open Forecast Value $$ (New and Add-on; by Qtr): $ Open Forecast Q1, $ Open Forecast Q2, $ Open Forecast Q3, $ Open Forecast Q4

ISR - Open Forecast (New and Add-on; by Qtr): # Open Forecast Q1, # Open Forecast Q2, # Open Forecast Q3, # Open Forecast Q4

ISR - Prioritized (New and Add-on; by Quarter): # Prioritized Q1, # Prioritized Q2, # Prioritized Q3, # Prioritized Q4

ISR - Engaged (New and Add-on; by Qtr): # Engaged Q1, # Engaged Q2, # Engaged Q3, # Engaged Q4

EMEA

2019 Plan: Q1, Q2, Q3, Q4, FY '19

OneSign
ConfirmID
Cortext
PatientSecure
IdG
Total

WON Value $$ (New and Add-on; by Quarter): $ WON Q1, $ WON Q2, $ WON Q3, $ WON Q4

WON (New and Add-on; by Quarter): # WON Q1, # WON Q2, # WON Q3, # WON Q4

Open Forecast Value $$ (New and Add-on; by Quarter): $ Open Forecast Q1, $ Open Forecast Q2, $ Open Forecast Q3, $ Open Forecast Q4

Open Forecast (New and Add-on; by Quarter): # Open Forecast Q1, # Open Forecast Q2, # Open Forecast Q3, # Open Forecast Q4

Prioritized (New and Add-on; by Quarter): # Prioritized Q1, # Prioritized Q2, # Prioritized Q3, # Prioritized Q4

Engaged (New and Add-on; by Quarter): # Engaged Q1, # Engaged Q2, # Engaged Q3, # Engaged Q4

APAC

2019 Plan: Q1, Q2, Q3, Q4, FY '19

OneSign
ConfirmID
Cortext
PatientSecure
IdG
Total

WON Value $$ (New and Add-on; by Quarter): $ WON Q1, $ WON Q2, $ WON Q3, $ WON Q4

WON (New and Add-on; by Quarter): # WON Q1, # WON Q2, # WON Q3, # WON Q4

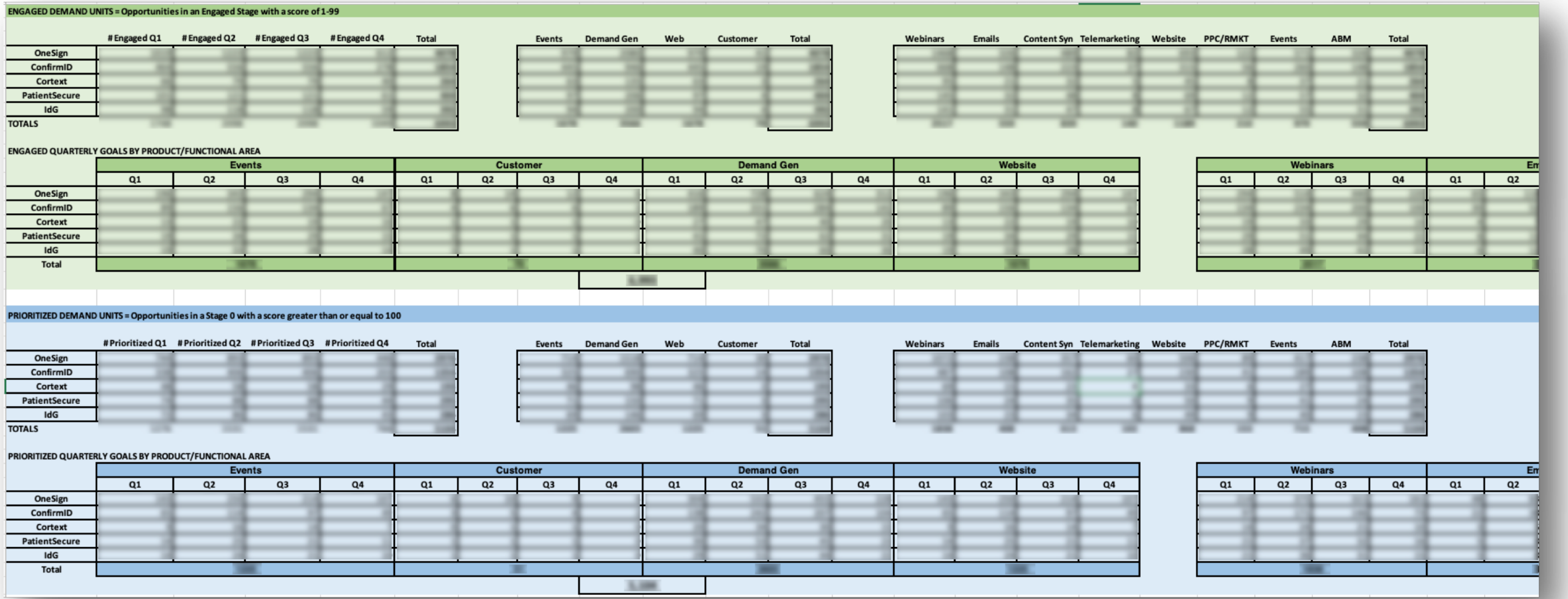
Open Forecast Value $$ (New and Add-on; by Quarter): $ Open Forecast Q1, $ Open Forecast Q2, $ Open Forecast Q3, $ Open Forecast Q4

Open Forecast (New and Add-on; by Quarter): # Open Forecast Q1, # Open Forecast Q2, # Open Forecast Q3, # Open Forecast Q4

Prioritized (New and Add-on; by Quarter): # Prioritized Q1, # Prioritized Q2, # Prioritized Q3, # Prioritized Q4

Engaged (New and Add-on; by Quarter): # Engaged Q1, # Engaged Q2, # Engaged Q3, # Engaged Q4

Drive Marketing Focus



ENGAGED DEMAND UNITS = Opportunities in an Engaged Stage with a score of 1-99

	# Engaged Q1	# Engaged Q2	# Engaged Q3	# Engaged Q4	Total
OneSign					
ConfirmID					
Cortext					
PatientSecure					
IdG					
TOTALS					

	Events	Demand Gen	Web	Customer	Total
OneSign					
ConfirmID					
Cortext					
PatientSecure					
IdG					
TOTALS					

	Webinars	Emails	Content Syn	Telemarketing	Website	PPC/RMKT	Events	ABM	Total
OneSign									
ConfirmID									
Cortext									
PatientSecure									
IdG									
TOTALS									

ENGAGED QUARTERLY GOALS BY PRODUCT/FUNCTIONAL AREA

	Events				Customer				Demand Gen				Website				Webinars				Em	
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
OneSign																						
ConfirmID																						
Cortext																						
PatientSecure																						
IdG																						
Total																						

PRIORITIZED DEMAND UNITS = Opportunities in a Stage 0 with a score greater than or equal to 100

	# Prioritized Q1	# Prioritized Q2	# Prioritized Q3	# Prioritized Q4	Total
OneSign					
ConfirmID					
Cortext					
PatientSecure					
IdG					
TOTALS					

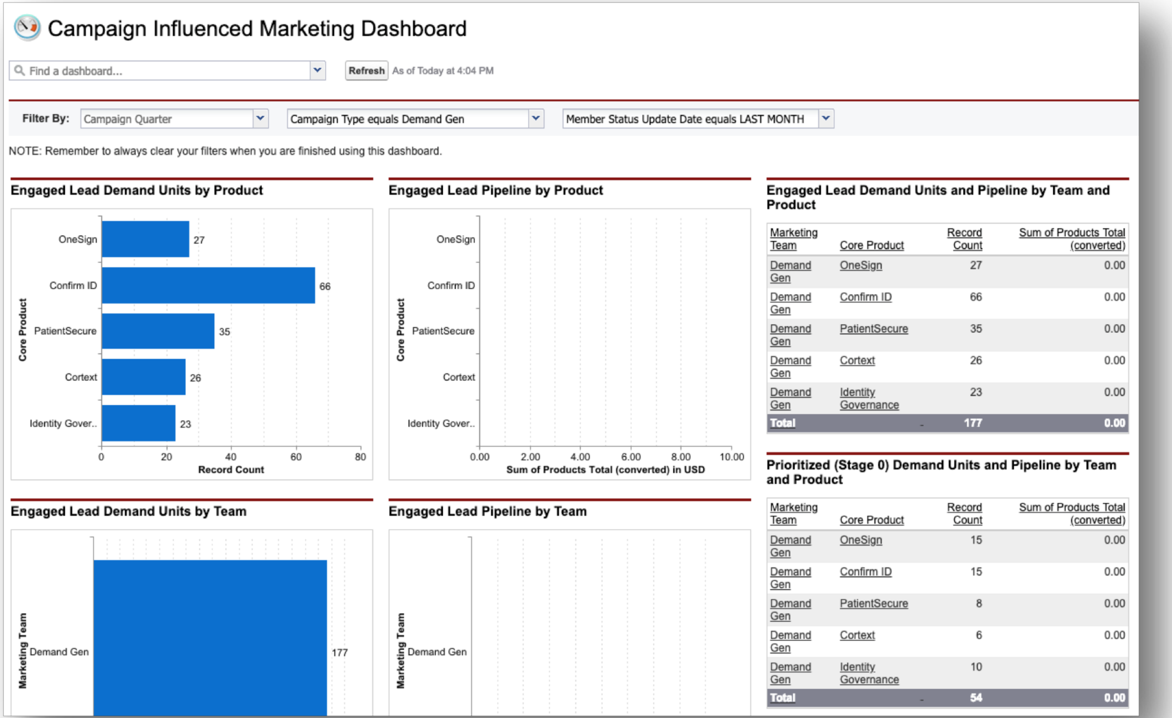
	Events	Demand Gen	Web	Customer	Total
OneSign					
ConfirmID					
Cortext					
PatientSecure					
IdG					
TOTALS					

	Webinars	Emails	Content Syn	Telemarketing	Website	PPC/RMKT	Events	ABM	Total
OneSign									
ConfirmID									
Cortext									
PatientSecure									
IdG									
TOTALS									

PRIORITIZED QUARTERLY GOALS BY PRODUCT/FUNCTIONAL AREA

	Events				Customer				Demand Gen				Website				Webinars				Em	
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
OneSign																						
ConfirmID																						
Cortext																						
PatientSecure																						
IdG																						
Total																						

Operationalized Model Reports



Campaign Influenced Marketing Dashboard

Find a dashboard...
Refresh

As of Today at 4:04 PM

Filter By: Campaign Quarter | Campaign Type equals Demand Gen | Member Status Update Date equals LAST MONTH

NOTE: Remember to always clear your filters when you are finished using this dashboard.

Engaged Lead Demand Units by Product

Core Product
OneSign
27
Confirm ID
66
PatientSecure
35
Cortext
26
Identity Gover..
23
0
20
40
60
80
Record Count

Engaged Lead Pipeline by Product

Core Product
OneSign
Confirm ID
PatientSecure
Cortext
Identity Gover..
0.00
2.00
4.00
6.00
8.00
10.00
Sum of Products Total (converted) in USD

Engaged Lead Demand Units and Pipeline by Team and Product

Marketing Team	Core Product	Record Count	Sum of Products Total (converted)
Demand Gen	OneSign	27	0.00
Demand Gen	Confirm ID	66	0.00
Demand Gen	PatientSecure	35	0.00
Demand Gen	Cortext	26	0.00
Demand Gen	Identity Governance	23	0.00
Total	-	177	0.00

Engaged Lead Demand Units by Team

Marketing Team
Demand Gen
177

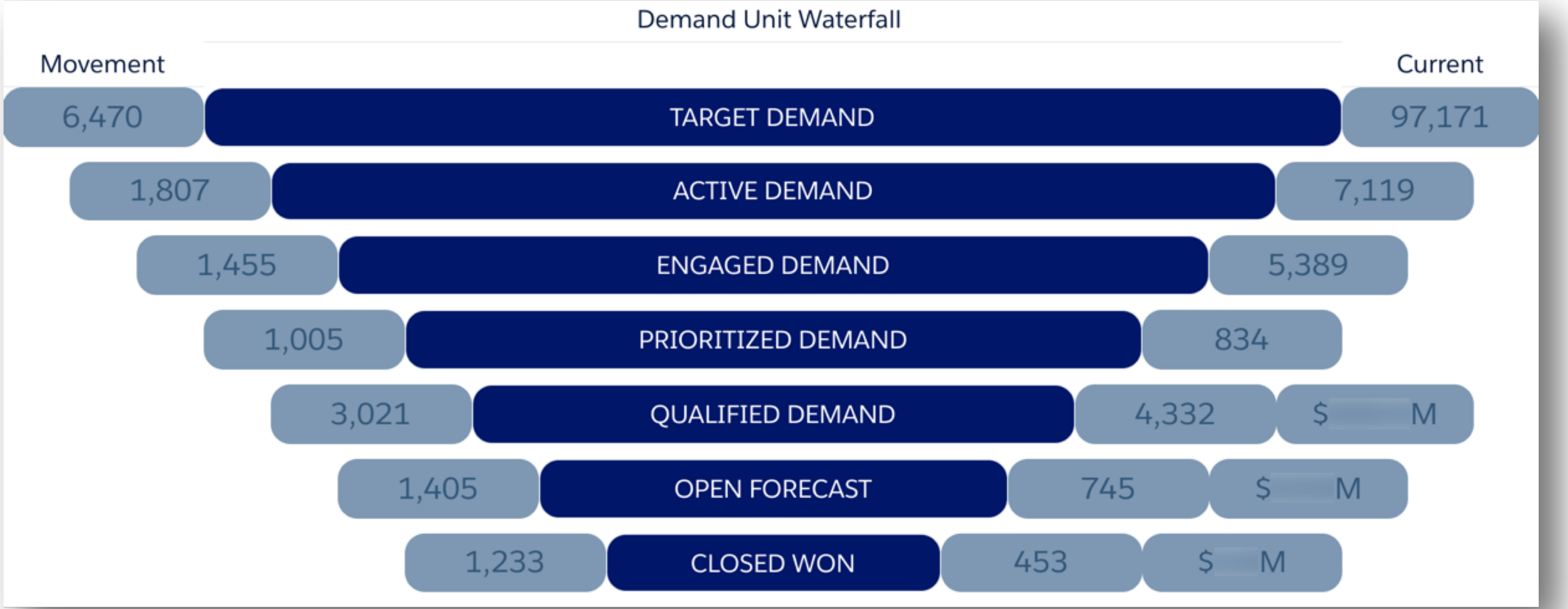
Engaged Lead Pipeline by Team

Marketing Team
Demand Gen

Prioritized (Stage 0) Demand Units and Pipeline by Team and Product

Marketing Team	Core Product	Record Count	Sum of Products Total (converted)
Demand Gen	OneSign	15	0.00
Demand Gen	Confirm ID	15	0.00
Demand Gen	PatientSecure	8	0.00
Demand Gen	Cortext	6	0.00
Demand Gen	Identity Governance	10	0.00
Total	-	54	0.00

Waterfall Movement

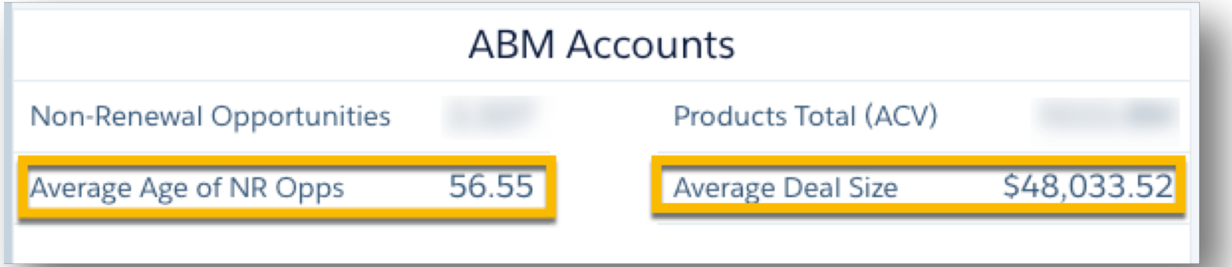


Demand Unit Waterfall

Movement		Current	
6,470	TARGET DEMAND	97,171	
1,807	ACTIVE DEMAND	7,119	
1,455	ENGAGED DEMAND	5,389	
1,005	PRIORITIZED DEMAND	834	
3,021	QUALIFIED DEMAND	4,332	$[redacted]M
1,405	OPEN FORECAST	745	$[redacted]M
1,233	CLOSED WON	453	$[redacted]M

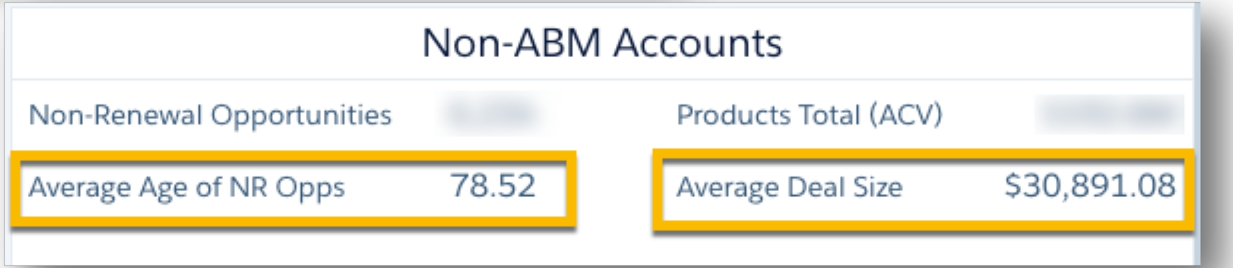
ABM vs. Non-ABM Performance

- For ABM credit, Account Strategy must match product sold



ABM Accounts

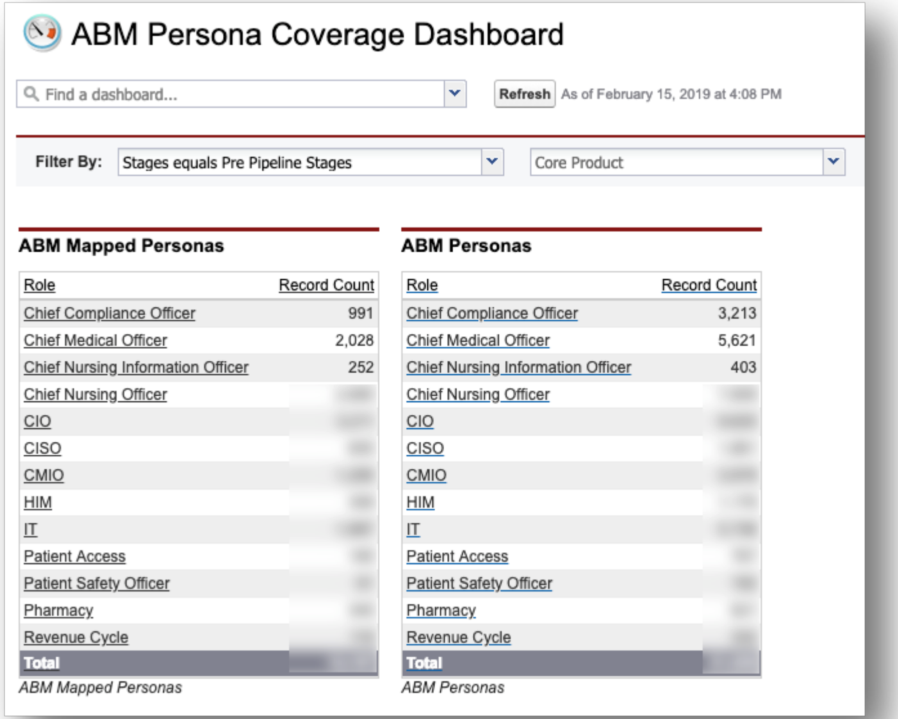
Non-Renewal Opportunities	[redacted]	Products Total (ACV)	[redacted]
Average Age of NR Opps	56.55	Average Deal Size	$48,033.52



Non-ABM Accounts

Non-Renewal Opportunities	[redacted]	Products Total (ACV)	[redacted]
Average Age of NR Opps	78.52	Average Deal Size	$30,891.08

Focusing on Persona Coverage



ABM Persona Coverage Dashboard

As of February 15, 2019 at 4:08 PM

Filter By: Stages equals Pre Pipeline Stages | Core Product

ABM Mapped Personas

Role	Record Count
Chief Compliance Officer	991
Chief Medical Officer	2,028
Chief Nursing Information Officer	252
Chief Nursing Officer	[redacted]
CIO	[redacted]
CISO	[redacted]
CMIO	[redacted]
HIM	[redacted]
IT	[redacted]
Patient Access	[redacted]
Patient Safety Officer	[redacted]
Pharmacy	[redacted]
Revenue Cycle	[redacted]
Total	[redacted]

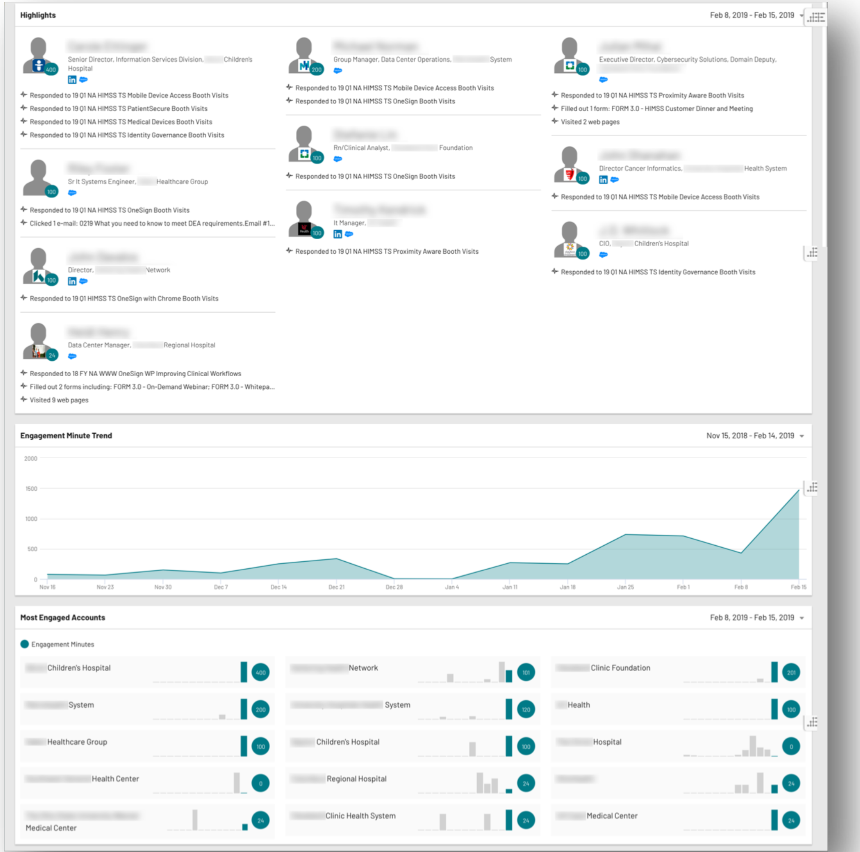
ABM Mapped Personas

ABM Personas

Role	Record Count
Chief Compliance Officer	3,213
Chief Medical Officer	5,621
Chief Nursing Information Officer	403
Chief Nursing Officer	[redacted]
CIO	[redacted]
CISO	[redacted]
CMIO	[redacted]
HIM	[redacted]
IT	[redacted]
Patient Access	[redacted]
Patient Safety Officer	[redacted]
Pharmacy	[redacted]
Revenue Cycle	[redacted]
Total	[redacted]

ABM Personas

Prioritizing Across a Territory



Highlights Feb 8, 2019 - Feb 15, 2019

[redacted]
Senior Director, Information Services Division, [redacted] Children's Hospital
400
- Responded to 19 Q1 NA HIMSS TS Mobile Device Access Booth Visits
- Responded to 19 Q1 NA HIMSS TS PatientSecure Booth Visits
- Responded to 19 Q1 NA HIMSS TS Medical Devices Booth Visits
- Responded to 19 Q1 NA HIMSS TS Identity Governance Booth Visits

[redacted]
Sr It Systems Engineer, [redacted] Healthcare Group
100
- Responded to 19 Q1 NA HIMSS TS OneSign Booth Visits
- Clicked 1 e-mail: 0219 What you need to know to meet DEA requirements.Email #1...

[redacted]
Director, [redacted] Network
100
- Responded to 19 Q1 HIMSS TS OneSign with Chrome Booth Visits

[redacted]
Data Center Manager, [redacted] Regional Hospital
24
- Responded to 18 FY NA WWW OneSign WP Improving Clinical Workflows
- Filled out 2 forms including: FORM 3.0 - On-Demand Webinar; FORM 3.0 - Whitepa...
- Visited 9 web pages

[redacted]
Group Manager, Data Center Operations, [redacted] System
200
- Responded to 19 Q1 NA HIMSS TS Mobile Device Access Booth Visits
- Responded to 19 Q1 NA HIMSS TS OneSign Booth Visits

[redacted]
Rn/Clinical Analyst, [redacted] Foundation
100
- Responded to 19 Q1 NA HIMSS TS OneSign Booth Visits

[redacted]
It Manager, [redacted]
100
- Responded to 19 Q1 NA HIMSS TS Proximity Aware Booth Visits

[redacted]
Executive Director, Cybersecurity Solutions, Domain Deputy, [redacted]
100
- Responded to 19 Q1 NA HIMSS TS Proximity Aware Booth Visits
- Filled out 1 form: FORM 3.0 - HIMSS Customer Dinner and Meeting
- Visited 2 web pages

[redacted]
Director Cancer Informatics, [redacted] Health System
100
- Responded to 19 Q1 NA HIMSS TS Mobile Device Access Booth Visits

[redacted]
CIO, [redacted] Children's Hospital
100
- Responded to 19 Q1 NA HIMSS TS Identity Governance Booth Visits

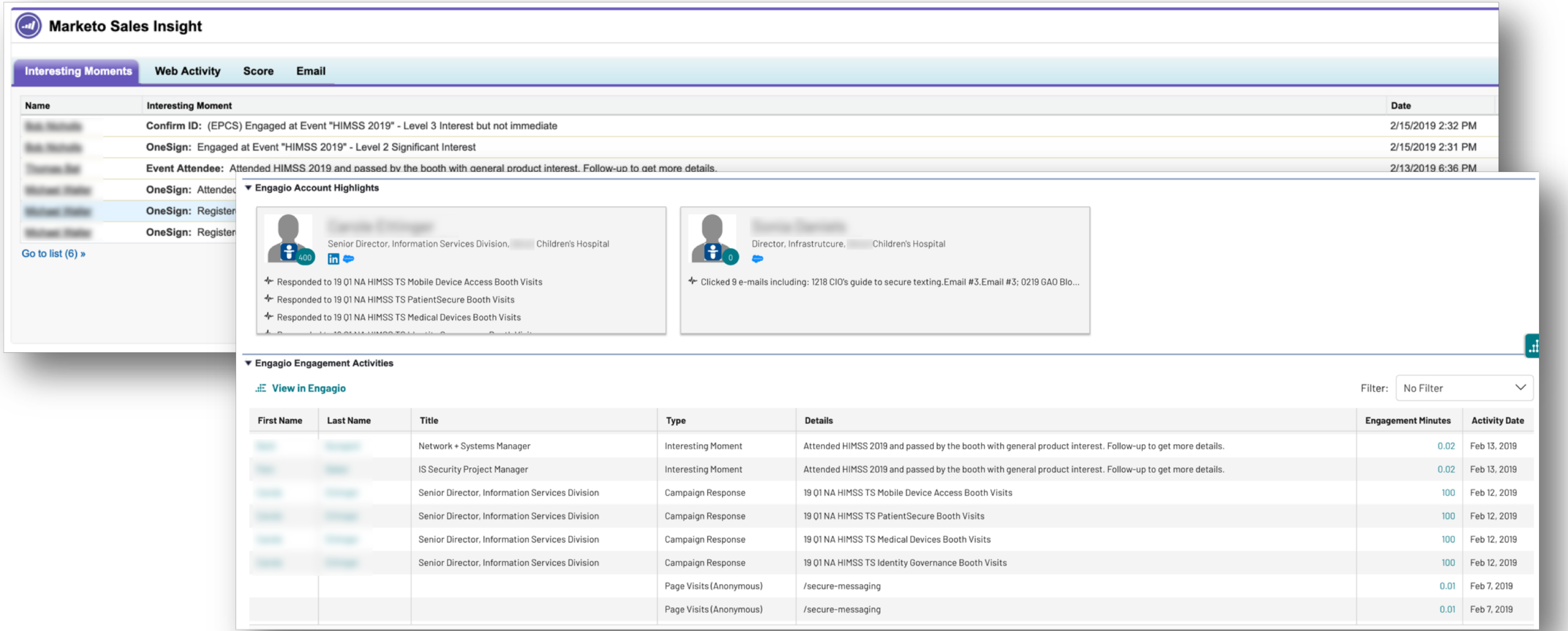
Engagement Minute Trend Nov 15, 2018 - Feb 14, 2019

Most Engaged Accounts Feb 8, 2019 - Feb 15, 2019

● Engagement Minutes

[redacted] Children's Hospital 400
[redacted] System 200
[redacted] Healthcare Group 100
[redacted] Health Center 0
[redacted] Medical Center 24
[redacted] Network 101
[redacted] System 120
[redacted] Children's Hospital 100
[redacted] Regional Hospital 24
[redacted] Clinic Health System 24
[redacted] Clinic Foundation 201
[redacted] Health 100
[redacted] Hospital 0
[redacted] 24
[redacted] Medical Center 24

Account Level Engagement Exposed



Marketo Sales Insight

Name	Interesting Moment	Date
[redacted]	**Confirm ID:** (EPCS) Engaged at Event "HIMSS 2019" - Level 3 Interest but not immediate	2/15/2019 2:32 PM
[redacted]	**OneSign:** Engaged at Event "HIMSS 2019" - Level 2 Significant Interest	2/15/2019 2:31 PM
[redacted]	**Event Attendee:** Attended HIMSS 2019 and passed by the booth with general product interest. Follow-up to get more details.	2/13/2019 6:36 PM
[redacted]	**OneSign:** Attended	
[redacted]	**OneSign:** Register	
[redacted]	**OneSign:** Register	

Go to list (6) »

Engagio Account Highlights

[redacted]
Senior Director, Information Services Division, [redacted] Children's Hospital
400

- Responded to 19 Q1 NA HIMSS TS Mobile Device Access Booth Visits
- Responded to 19 Q1 NA HIMSS TS PatientSecure Booth Visits
- Responded to 19 Q1 NA HIMSS TS Medical Devices Booth Visits

[redacted]
Director, Infrastrutcure, [redacted] Children's Hospital
0

- Clicked 9 e-mails including: 1218 CIO's guide to secure texting.Email #3.Email #3; 0219 GAO Blo...

Engagio Engagement Activities

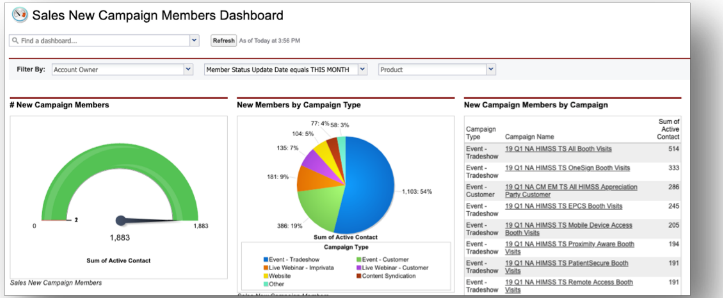
View in Engagio

Filter: No Filter

First Name	Last Name	Title	Type	Details	Engagement Minutes	Activity Date
[redacted]	[redacted]	Network + Systems Manager	Interesting Moment	Attended HIMSS 2019 and passed by the booth with general product interest. Follow-up to get more details.	0.02	Feb 13, 2019
[redacted]	[redacted]	IS Security Project Manager	Interesting Moment	Attended HIMSS 2019 and passed by the booth with general product interest. Follow-up to get more details.	0.02	Feb 13, 2019
[redacted]	[redacted]	Senior Director, Information Services Division	Campaign Response	19 Q1 NA HIMSS TS Mobile Device Access Booth Visits	100	Feb 12, 2019
[redacted]	[redacted]	Senior Director, Information Services Division	Campaign Response	19 Q1 NA HIMSS TS PatientSecure Booth Visits	100	Feb 12, 2019
[redacted]	[redacted]	Senior Director, Information Services Division	Campaign Response	19 Q1 NA HIMSS TS Medical Devices Booth Visits	100	Feb 12, 2019
[redacted]	[redacted]	Senior Director, Information Services Division	Campaign Response	19 Q1 NA HIMSS TS Identity Governance Booth Visits	100	Feb 12, 2019
			Page Visits (Anonymous)	/secure-messaging	0.01	Feb 7, 2019
			Page Visits (Anonymous)	/secure-messaging	0.01	Feb 7, 2019

Sales Exposure to New ABM Model

- Prioritized (Stage 0) Opportunities
  - New SLAs and dispositioning required
  - These are the new MQL but at the Account/Opportunity level
- Campaign members need to be exposed for Account Activity
  - Clearly articulate these are immature leads!
  - No formal SLAs or follow-up required here
  - Sales process is to add a Salesforce Activity



Sales New Campaign Members Dashboard

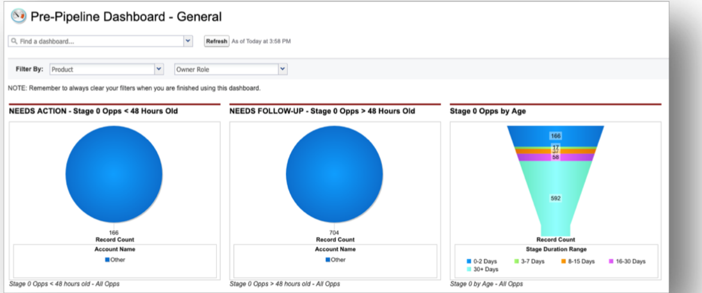
Refresh As of Today at 3:56 PM

Filter By: Account Owner | Member Status Update Date equals THIS MONTH | Product

Find a dashboard...
# New Campaign Members
0
2
1,883
1,883
Sum of Active Contact
Sales New Campaign Members
New Members by Campaign Type
77: 4%
58: 3%
104: 5%
135: 7%
181: 9%
1,103: 54%
386: 19%
Sum of Active Contact
Campaign Type
Event - Tradeshow
Event - Customer
Live Webinar - Imprivata
Live Webinar - Customer
Website
Content Syndication
Other

New Campaign Members by Campaign

Campaign Type	Campaign Name	Sum of Active Contact
Event - Tradeshow	19 Q1 NA HIMSS TS All Booth Visits	514
Event - Tradeshow	19 Q1 NA HIMSS TS OneSign Booth Visits	333
Event - Customer	19 Q1 NA CM EM TS All HIMSS Appreciation Party Customer	286
Event - Tradeshow	19 Q1 NA HIMSS TS EPCS Booth Visits	245
Event - Tradeshow	19 Q1 NA HIMSS TS Mobile Device Access Booth Visits	205
Event - Tradeshow	19 Q1 NA HIMSS TS Proximity Aware Booth Visits	194
Event - Tradeshow	19 Q1 NA HIMSS TS PatientSecure Booth Visits	191
Event - Tradeshow	19 Q1 NA HIMSS TS Remote Access Booth Visits	191



Pre-Pipeline Dashboard - General

Refresh As of Today at 3:58 PM

Filter By: Product | Owner Role

NOTE: Remember to always clear your filters when you are finished using this dashboard.

Find a dashboard...
NEEDS ACTION - Stage 0 Opps < 48 Hours Old
166
Record Count
Account Name
Other
Stage 0 Opps < 48 hours old - All Opps
NEEDS FOLLOW-UP - Stage 0 Opps > 48 Hours Old
704
Record Count
Account Name
Other
Stage 0 Opps > 48 hours old - All Opps
Stage 0 Opps by Age
166
17
37
58
592
Record Count
Stage Duration Range
0-2 Days
3-7 Days
8-15 Days
16-30 Days
30+ Days
Stage 0 by Age - All Opps

Other Important Conversations

- Sourcing conversations “disappear” – we all touch them all
- Automation vs manual (tech stack, ABM core vs lite, etc.)
- Customers vs prospects in ABM journeys
- Train, re-train, train again, hand hold, train again, help them bookmark reports, answer questions...

Key Takeaways

- Sales collaboration
- Technology infrastructure
- Resources and timing
- Measurement considerations from the start