DEMAND GEN® REPORT

THE 2024 STATE OF INTENT & SIGNAL DATA

Layering Intent & Signal Data To Surround **B2B Buyers With Relevant Content & Messaging**

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Introduction

While Google still waffles on its **third-party cookie stance**, practitioners are renewing their focus on intent data strategies: 63% plan to **increase their intent/signal investments** in the new year. And with that investment comes navigating some rocky terrain, especially in the era of stealth buying journeys.

Despite a penchant for anonymity, **more than half (58%)** of B2B buyers are looking for hyper-personalized outreach — meaning practitioners need to proactively identify buyer signals to serve up relevant content and offers. This requires a strong intent data strategy, which includes integrating intent insights with firmographic and technographic data to craft appropriate messages that engage these elusive buyers.

"Most of the buying journey happens before prospects reach out directly," said Meredith Fuller, Managing Director at growth consulting and marketing firm **Marketbridge**. "Not only are buyers waiting until they're ready, but research also suggests that only 5% of a company's total addressable market is in the market at any time. Practitioners need to ensure they're in front of those active buyers and helping them on their journey by providing value and education, and intent is the cornerstone of that."
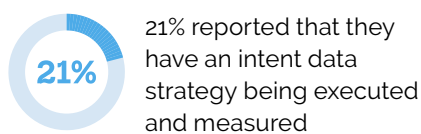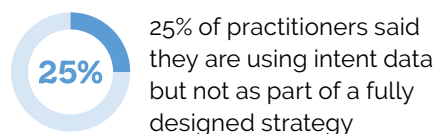
But businesses can't just collect data to store in a warehouse or CRM. Instead, they must effectively interpret and apply it to their sales and marketing strategies to craft the outreach buyers crave. To better understand the current intent/signal landscape, this special report will uncover how to:

- Balance buyers' desires for hyper-relevant content with their privacy concerns;

- Seamlessly integrate intent data with CRM systems and ensure all necessary parties have access to it;

- Identify specific accounts that are actively researching offerings;

- Tailor experiences to match the specific needs and preferences of individual prospects; and

- Anticipate customer needs to reach out at the optimal time.
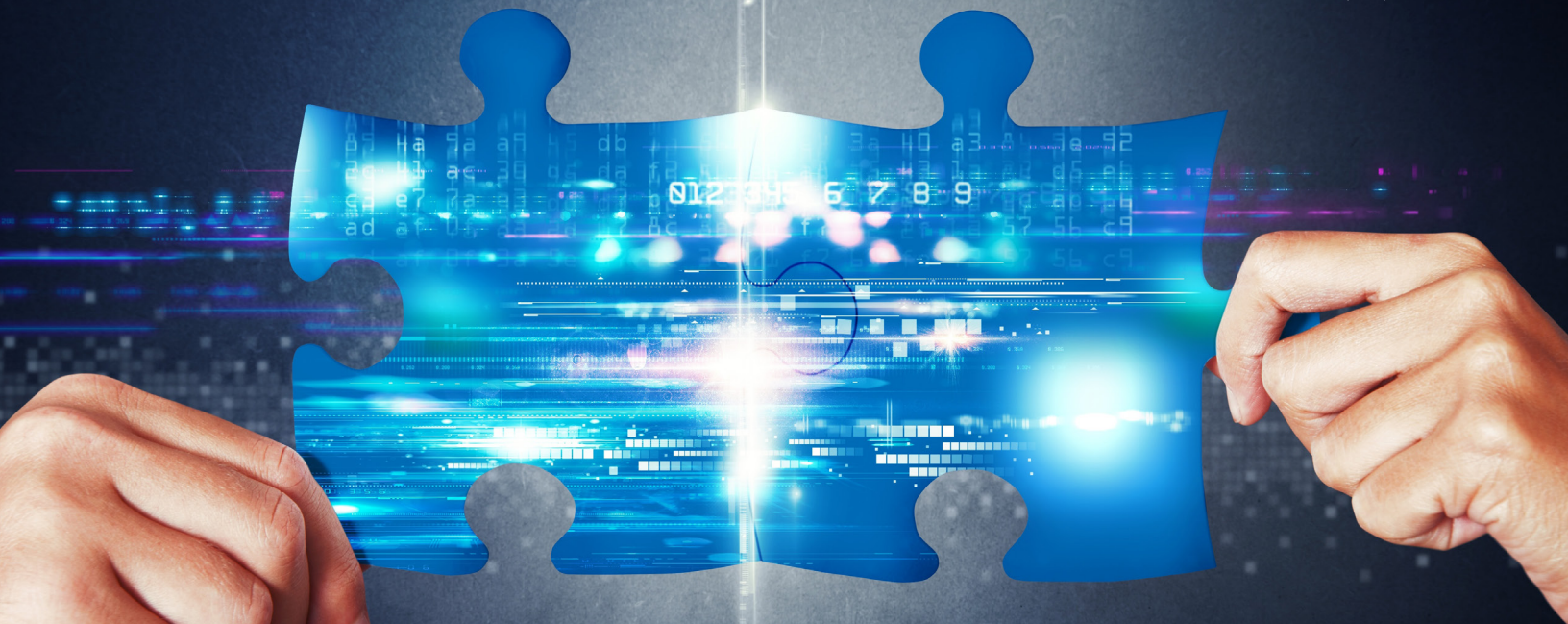
Integrating Intent Across Systems To Ensure
All Departments Have Access

Despite intent data taking up the **lion's share** of demand generation budgets, it appears that companies are still struggling to action the data strategically. When a recent research report asked respondents about the current state of intent data usage at their organization:

25% — 25% of practitioners said they are using intent data but not as part of a fully designed strategy

21% — 21% reported that they have an intent data strategy being executed and measured

17% — 17% are currently developing an intent data strategy

"We've been talking about intent data for more than eight years, and I think it's more overwhelming than ever for many marketers," said Sarah Sehgal, Director of Growth Marketing for **OpenSesame**, an employee E-learning platform.. "Most sales teams are being thrown disparate intent data from marketing's new tools, and most marketers are scrambling trying to figure out how to justify the spend on these intent platforms. The issue is no longer access to intent data, but rather how to consolidate, interpret and action it effectively."

To that end, Sehgal suggested that marketers first think about purpose before turning their focus to tools and tech. She noted that some questions to ask regarding intent/signal technology adoption include:

1 What are we trying to achieve?

2 What kind of data do we need to do that, and how does that fit into our current data infrastructure?

3 Who will use it, and how will it augment their current workflows?

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How Okta Achieved A 22% Increase In Influenced Revenue

Okta, an independent identity provider, seeks to enable organizations to use any technology. The company has been recognized by Gartner as a leader in access management for seven consecutive years, offering the most advanced tools in the market.

THE CHALLENGE

Reprioritizing Target Accounts For ABM Success

The Okta marketing team, already experienced with account-based marketing (ABM), faced new challenges when they engaged RollWorks. The team needed to support ambitious pipeline generation targets across all sales go-to-market (GTM) segments, focusing on three critical growth areas: IT modernization, security and digital transformation.

These segments required Okta to evolve beyond its core identity management (SSO) offerings and rebrand itself as a security company. To succeed, the team needed a deeper understanding of prospect intent to engage the right contacts within each account at the right time. They also needed to refresh their approach to targeting, as their existing target account lists (TALs) were outdated and lacked centralization.

"We were receiving a high volume of accounts but needed a more quantitative way to prioritize our efforts," said Mae Cadao, Digital ABM Program Manager for Okta.

Without better account prioritization and insight into prospect intent, Okta risked wasting resources on engaging unlikely buyers with generic awareness ads.

"We wanted to turn the biggest companies into Okta customers," said Kadie Murphy, Digital ABM Program Sr. Specialist at Okta. "The question was, how do we do that from a digital marketing and account targeting perspective?"

Updating TALs With Intent Data

To align with Okta's new market positioning, Cadao's team created segments in RollWorks based on interests and keywords aligned with the new GTM pillars. They developed content maps to serve the best resources based on each prospect's intent, considering both interest level and buyer's journey stage.

The team collaborated closely with sales and solutions marketing teams to review account lists and content maps: "The goal was to create marketing and sales alignment around the intent keywords for building new ABM campaigns," noted Murphy.

By refining TALs and using data from Salesforce, the Okta team was better equipped to create a playbook that delivered relevant content to the right accounts.

Central to this effort was aligning the marketing message with the prospect's intent level. The Okta digital team optimized and refined their ABM campaigns by:

- Moving to dynamic lists to keep account lists up-to-date;
- Activating scoring using RollWorks Fit Grade;
- Regularly collaborating with sales and marketing on TAL and intent keyword accuracy;
- Frequently refreshing creative content and pausing low-performing ads; and
- Testing new ad types and content, including HTML5 and customer stories.

THE RESULTS

Improving Business Outcomes With Intent Data

After implementing intent-based playbooks with RollWorks, the Okta digital team saw:

17%	**2.7X**	**63%**	**22%**
improvement in click-through rate	reduction in cost per conversion	reduction in time from opportunity creation to closed deal	increase in influenced revenue

Furthermore, accounts targeted with intent-based playbooks converted to opportunities at a 24X higher rate than those without intent data. These metrics enabled Cadao's team to strengthen alignment with sales and support Okta's broader GTM strategies.

Looking ahead, Cadao and her team plan to evolve their ABM model with more stage-based content mapping and personalization using intent data. They'll explore journey stages and events, expand intent-based ABM to other channels like landing pages and target additional verticals.

"Looking at the numbers now, it's clear we made the right decision to focus on intent data," said Cadao. "It's working — the new logos are starting to roll in."

Determining The Most Effective Signal
& Applying It To Marketing

Most B2B marketing teams — 60% — leverage **three to seven combined sources** of intent data, while another **60% believe** they're using these multiple data sources without clear differentiation between the value each provides, leading to missed opportunities and wasted resources.

"There are thousands of intent signals and sources, so practitioners need to use organizational goals and strategies to guide signal prioritization," said Sehgal. "There are great examples when it comes to varying growth motions: If your org is focusing on partner-led growth, technographic-based signals could be prioritized to identify accounts to target for through- and with-based partner motions. On the other hand, if expansion and retention are key business goals, customer signals (both positive and negative) should be outlined and tied to activation motions."

With all the noise in the field, practitioners must leverage their intent strategy accordingly, as Marketbridge's Fuller believes there are more ways marketing could — and should — use intent data to surround target accounts.

"Many marketers' use of intent is focused on finding accounts that are surging or in a buying motion, and then targeting them with specific campaigns," said Fuller. "That makes sense, but there are other ways folks can leverage intent, such as competitor insight or pre- and post-analysis."

To provide some context, Fuller shared a hypothetical scenario about a company that planned to break major corporate news. She explained that the organization's marketing team should focus on finding sentiment around the brand pre- and post-announcement to determine the success of the announcement and take notes for future releases about what worked and what didn't.

On the competitor analysis side, Fuller suggested performing an intent analysis on current accounts to see if any of them are researching competitors, which would indicate potential upcoming churn.

"When you're seeing surges or intent signals, you need to use that to identify those in a buying motion and ensure you're using that information to not only tailor your messages to inform your content to deliver experiences that are robust and meaningful, based on those intent signals," said Fuller. "It should not only be used to suggest there's a buying motion in place and dropping those accounts into your campaign but use it to inform the messaging, assets, content and outreach."

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Cracking The Code On Intent Data: Navigating Privacy, Precision & Performance In 2024

With Greg Jordan, DemandScience

As marketers grapple with tightening privacy regulations and the demand for hyper-personalized content, the role of intent data has never been more critical — or more complex. In this Q&A, Greg Jordan — SVP of Product Management for **DemandScience**, a global revenue intelligence platform — sat down with the Demand Gen Report team to discuss everything from balancing hyper-relevant content with privacy concerns to leveraging AI-driven data for more precise targeting.

Demand Gen Report: In your opinion, what's the current state of intent/ signal data?

Greg Jordan: The current state of intent and signal data is at a critical inflection point due to tightening privacy regulations and the widespread adoption of remote work.

These factors make it more challenging to resolve signals accurately and identify potential business intent. As a result, the landscape is evolving, and the market is increasingly favoring vendors who employ advanced methods to enhance signal resolution and prioritize quality over quantity.

B2B marketers whose intent data providers integrate artificial intelligence (AI) to filter noise, enhance precision, map and rank the intent signal with AI-based scoring systems and provide predictive analytics to determine when marketers should engage with buyers, with what content and through which channels, will maximize campaign effectiveness and success.

DGR: How can practitioners balance buyers' desires for hyper relevant content with their concerns for privacy?

Jordan: Tailoring content to specific personas at the business level rather than an individual level will help achieve this balance and is more feasible given the greater ease of business-level signal resolution relative to individual-level signal resolution, which presents issues regarding PII and compliance.

Understanding the buyer's problem is the cornerstone of creating highly relevant content. Layering this understanding with a 360-degree view of the business through complementary data like technographic, firmographic, workforce breakdown from a skillset and persona level, events, career postings, news alerts and other factors provides a robust foundation for content personalization that resonates with buyers and guides them through the next stages of their journey.

DGR: How can marketers seamlessly integrate intent data with CRM systems and ensure all necessary parties have access?

Jordan: Data integrations should not be challenging for marketers; providers should offer connectors to popular CRM and MAP systems, ensuring they can be managed through the CRM/MAP without the client needing technical knowledge.

Further, marketers should also make sure their providers can solve challenges such as resolving the identities of the buyers and buyer groups in a compliant manner.

Applying AI tools and methods to handle input data from different sources, formats and standards can make the integration seamless and accurate.

DGR: How can practitioners leverage intent/signal data to identify specific accounts that are actively researching offerings?

Jordan: Intent scores at the company and company-location level allow for account prioritization, with the highest-scoring accounts being targeted first in top-of-funnel marketing efforts. First-party signals, such as ad clicks, website visits, email campaign clicks and opens, should be treated with the most importance since they represent a potential buyer's deliberate interest in a brand and can help uncover where they are in the buying journey.

To achieve this at scale, practitioners need to get several things right: The research topic, the persona of the individual researching and the buying group (or committee) given a set of personas. Fortunately, recent improvements in the domain of natural language understanding can help discover these signals from the intent raw data.

Other factors, such as recency, reliability and relevance can then be applied to determine the accuracy and strength of the signals.

DGR: How can marketers tailor experiences to match the specific needs and preferences of individual prospects?

Jordan: Using business-level personas versus individual-level personas is a privacy and compliance-driven trade-off, but with advanced analytics and strategies detailed earlier, the probability of delivering the right content at the right time is significantly higher.

Additionally, in keeping with the theme of balancing personalization with privacy, provide multiple engagement options in your outreach. Content such as newsletters, whitepapers and invitations to follow your brand on social media along with opt in/opt out options achieves several things at once: consent, new first-party intent signals and valuable information for sales down the line.

DGR: How can practitioners anticipate customer needs to reach out at the optimal time?

Jordan: Reaching out as close to the date a company first researched a topic gives the seller a first-mover advantage over competitors and establishes a brand presence. Even if marketers don't realize immediate results, tracking accounts from this point forward is critical to anticipating the next stages of their buyer journey.

Layering technographics and firmographics with intent data is also crucial for optimal outreach timing. Understanding potential needs or pain points associated with a business and buyer's specific tech stack and business model enables proactive anticipation and timely outreach from the seller, even without intent data that signals that research is underway.

There is no question that building, compiling and enriching intent data and signals is a science, but understanding how to interpret and leverage that data is a skill. This should also be a factor marketers consider when selecting a provider — do you simply need a data dump, or a provider with strategic expertise?

DGR: How has the current economic and regulatory landscape impacted the role of data quality in marketing, particularly regarding intent and signal providers?

Jordan: Today's 'new normal' has coupled a tight regulatory landscape with tighter economic conditions. This has significantly increased the importance of quality as marketers aim to squeeze as much as they can from their budgets. Over time, intent/signal providers who can provide the most accurate, compliant and granular data regarding topic taxonomy, location and business resolution, and research activity will provide the most value to sellers.

Anticipating Account Needs & Predicting Buying Cycles

The modern marketing landscape calls for proactivity in spotting accounts actively researching, anticipating account needs and making the most of intent signals — but data alone can't do the heavy lifting. Instead, the real power lies in translating those insights into timely, strategic actions. That means not just recognizing intent signals but weaving them into both sales and marketing efforts to deliver the perfect message, at the ideal time.

"Most marketers know the adage 'right place, right time, right message,'" said Sehgal. "Intent data is increasingly becoming the foundation of not just the right time, but the right place and right message, as well. When marketing (and sales) take the time to outline their customer lifecycle from awareness through customer loyalty, that's where the magic happens. Varying signals can be tied to each stage across that journey to inform teams of when an account is ready to learn a little bit more versus when they're deep in research and ready to buy."

This evolving focus on intent data integration reflects a broader trend toward creating simplicity and alignment in go-to-market strategies. It's no longer enough to identify interest — teams must weave in other key data sources, such as firmographics, technographics and engagement metrics, to craft a more holistic view of each account.

"What I'm seeing more is a shift in focusing on integrating intent signals with other data sources, like firmographics, technographics and engagement metrics to create simplicity," said Sehgal. "Simplicity for sales to action on, simplicity for marketers to build programs from and simplicity for customers and prospects to receive relevant, valuable messaging. Ultimately, the key shift is moving from identifying interest to orchestrating a highly targeted, value-driven approach that prioritizes quality over quantity in outreach."

Conclusion

Effectively leveraging intent data requires a careful balance between delivering hyper-relevant, personalized content and respecting buyers' privacy concerns. By seamlessly integrating intent data with CRM systems and ensuring access for all key stakeholders, organizations can gain a clearer view of which accounts are actively researching and ready to engage. Tailoring experiences to meet the unique needs and preferences of each prospect, while anticipating customer needs at the right moment, allows for more strategic and meaningful interactions. When executed well, this approach not only strengthens relationships but also drives higher-quality engagement and better outcomes across the customer journey.

"It's about taking intent and signal intelligence and moving beyond just targeting folks with your campaign," said Fuller. "You can use it to inform your messaging, content, experience and sales cycles. It's doing as much as you possibly can to make buyer experiences better at the end of the day."

RollWorks

RollWorks is an Account-Based platform that leverages 15 years of expertise in collecting and refining 4.2 billion digital profiles to provide unparalleled buyer insights and activation solutions, empowering B2B marketers to drive full-funnel outcomes effectively.

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DemandScience is the premier B2B demand generation company accelerating global growth for clients. The DemandScience intelligence platform empowers B2B organizations to swiftly identify the right accounts and target in-market buyers with precision. By combining groundbreaking technologies, machine learning and data science innovation, the company ensures timely delivery of accurate data, intelligence, and insights, adding value to the end-to-end journey from initial engagement to conversion.
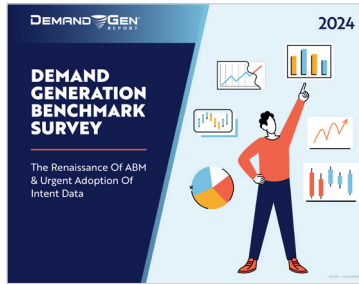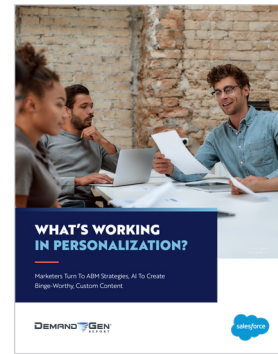
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State Of Intent-Driven Strategies

Demand Generation Benchmark Survey

What's Working in Personalization

DEMAND GEN REPORT

Demand Gen Report is a targeted online publication that uncovers the strategies and solutions that help companies better align their sales and marketing organizations, and ultimately, drive growth. A key component of the publication's editorial coverage focuses on the sales and marketing automation tools that enable companies to better measure and manage their multichannel demand generation efforts.

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