

DATA ANALYTICS

CUSTOMER STORY

Naylor Association Solutions

Increasing marketing efficiency and optimizing lead scoring with Qlik AutoML.



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“I thought, nope, we’ve got it. We’ve got lead scoring. You can’t teach us anything. And you know, I think that one of the things Kraken has shown me since is, I didn’t know what I didn’t know.”

Chad Lloyd, Director of Sales and Marketing Operations at Naylor Association Solutions

Objective

Lead scoring and qualification are vital components of any marketing-sales processes and Naylor needed a more efficient way of capturing data and scoring leads. Account Executives were being asked to fill out close to 30 different data fields in their

CMS that were then used by the marketing automation platform for scoring and qualification. Salespeople were frustrated at the time lost filling out fields they viewed as unnecessary, while marketing couldn’t provide a better justification for the data other than they needed it. “We would tell the sales reps, you’ve got to fill out all of these fields. We couldn’t tell them why they had to fill out those fields or which fields were more important than others.”

Solution

It can be difficult to transition to new technology and a new way of doing things. Growing pains are to be expected and there is often resistance to a new approach

to a traditional process. As Chad Lloyd said, “I thought, nope, we’ve got it. We’ve got lead scoring. You can’t teach us anything.” However, once Naylor recognized the way machine learning could improve efficiency in lead scoring, lead generation, and data analysis, they began searching in earnest for a machine learning solution.

Naylor looked at self-service platforms, providers that would build a 100% custom algorithm for their specific use case, and automated machine learning solutions like BigSquid.ai’s Kraken. Ultimately, they chose BigSquid.ai due to the ease-of-use of the platform and rapid time to value.

About Naylor

Naylor Association Solutions empowers professional associations to deliver greater value, engage with its members, and increase non-dues revenue by providing a variety of services. For example, they help their customers with things such as member-communications by delivering magazines, newsletters, or directories to association members. They also help associations provide career solutions for their members, plan and execute trade shows and events, association management software (AMS), and assist association members to maintain certifications.

Outcome

Since working with BigSquid.ai, Naylor has identified several areas of ROI that extend beyond the traditional measurable results of dollars saved or loss decreased.

For one, working with the customer service and data science teams at BigSquid.ai, Naylor has been able to optimize lead scoring and significantly reduce the number of fields required in the CMS. This has saved their salespeople from gathering unnecessary data and wasting precious time filling in unnecessary fields.

Second, marketing has become more efficient. Through the insights gained from using Kraken, Naylor has realized their ideal target customer is slightly different than what they originally believed and with this new information are able to create highly targeted messaging. In addition, they now have greater clarity on which leads are more likely to “close-won” and which are worth the extra time and resources to nourish. Marketing is now able to contribute a higher volume to the sales pipeline than before.

Finally, there is the added satisfaction and confidence that comes from having data-driven insights and being able to make the right decisions based off of those insights. According to Chad, “I feel like the superhero, I feel like I’m empowered and that I can take any problem that our organization has and I can take this more empirical, methodical approach to solving it. Kraken gives me something that can make me feel good about those decisions and I can deliver that to our executive team and they can know that that’s not just a subjective opinion or subjective data.”

Chad also noted how these new insights have made his job easier. “At the end of the day, people want to go home and feel like they did a good job. They want to feel like they’re not wasting their life away and they’re driving change and delivering superior value to their clients. I think that Kraken is the first piece of technology that I’ve ever purchased that made that so easy to deliver.”



About Qlik

Qlik’s vision is a data-literate world, where everyone can use data and analytics to improve decision-making and solve their most challenging problems. Qlik provides an end-to-end, real-time data integration and analytics cloud platform to close the gaps between data, insights and action. By transforming data into Active Intelligence, businesses can drive better decisions, improve revenue and profitability, and optimize customer relationships. Qlik does business in more than 100 countries and serves over 50,000 customers around the world.

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