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Quick Win Guide

Set Up an Integrated Sales & Marketing Play in 5 Steps

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In this guide walk through how to identify a target audience, set up the campaign and execute in full alignment with your sales partners. We also share example outreach plans and success metrics to track.

Step 1: Determine Your Audience

For a sending campaign to make an impact, you have to demonstrate that you understand your audience. Are you trying to reach consumers or enterprise decision-makers? Directors or CEOs? Is your audience in the same geographic location or spread worldwide? These answers will help determine much of the campaign. For example, if you're targeting C-level executives, you might want to invest in a higher-budget item rather than a desk trinket.

Consider the breadth of your audience, as well. If you're targeting a large group of conference attendees who have various job functions, experience levels, and industries, focus on a gift that has wide appeal. If it's a more targeted audience, they may have overlapping interests and pain points that you can use to inform the campaign.

Finally, determine the outcome you'd like to drive. Are you trying to drive attendance to an event? Get prospects to sign up for a product demo? Upsell existing customers? Onboard new employees? Each of these goals has different implications for executing and measuring the success of your campaign.

Step 2: Set Up Integrations and Your Touches

Ensure that you all have all relevant integrations in place. Integrations are critical to the success of your campaign because they allow you to orchestrate across channels and teams. Here are some recommendations:

Marketing	CRM, MARKETING AUTOMATION **HubSpot** Include personalized gifts, branded swag, and eGifts by adding Sendoso to your workflows.	MARKETING AUTOMATION **Marketo** (An Adobe Company) Automate personalized gifts, eGifts and more, based on any smart list criteria and measure campaign performance.	MARKETING AUTOMATION **Eloqua** Add personalized gifts, branded swag, and eGifts to your campaigns, track campaign success, and analyze results.	MARKETING AUTOMATION **Pardot** Automatically send, track, measure and identify best performing eGifts campaigns using Sendoso with Pardot.
Sales	**Salesforce** Send items directly from your contacts and leads, measure campaign performance with ROI dashboards.	**Outreach** Add a personal touch to your prospecting by allowing teams to send items directly from Outreach.	**SalesLoft** Allow your sales & SDR teams to send personalized gifts, branded swag, and eGifts directly from SalesLoft cadences.	**XANT** Add personalized gifts, branded swag, and eGifts in your sales team's multi-channel Playbooks to drive higher engagement.

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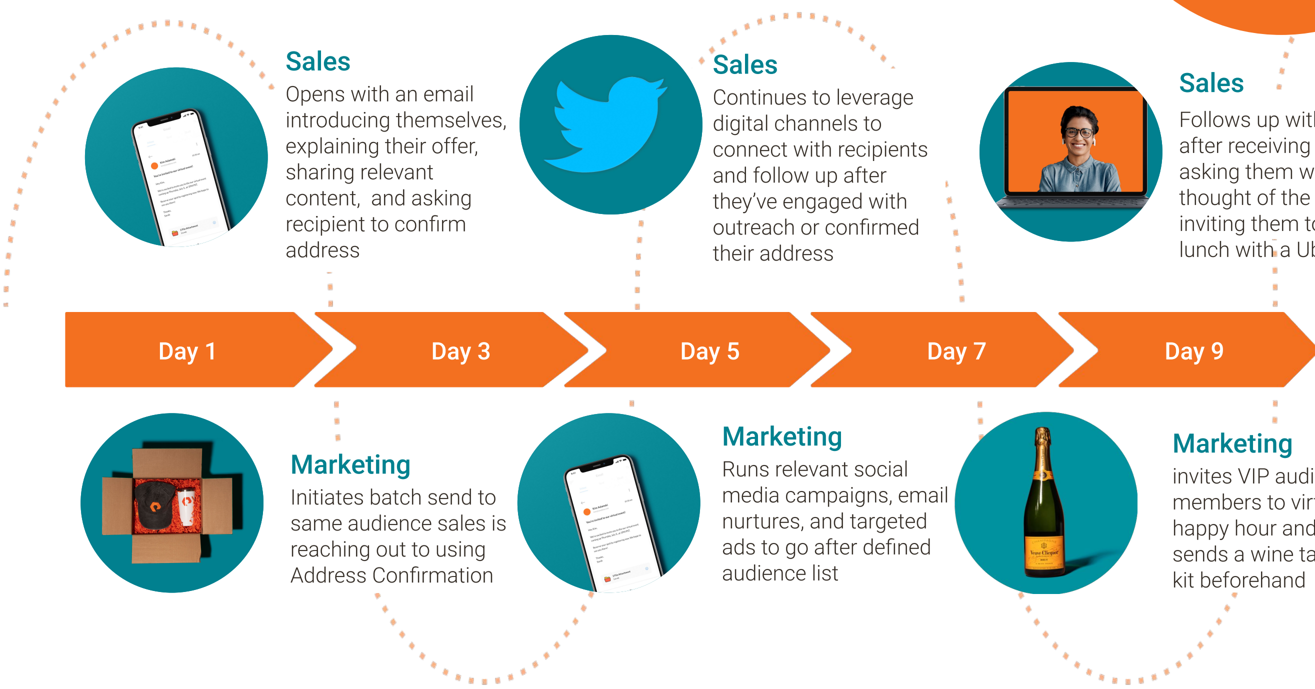
Next step is to set up your touches. Some of the best Touches for an integrated campaign included branded items the align with the overarching theme of your campaign; Sendoso Direct options like coffee or wine for meeting over drinks; or eGifts for coffee, lunch, or happy hour. To enable your sales team, be sure to Include details about when and how each touch should be used, either in the touch name or the Touch notes for sender. For example: **SDRs - Door Opener - Coffee eGift** or **AE - Meeting Follow Up - Sweet to Meet You Branded Box**

Step 3: Draft Your Playbook

Create a playbook outlining the different players, channels, messages, and steps involved throughout the entire campaign. Each touchpoint and the message included should align with the overall theme and design concept of your campaign so that your recipient experiences a cohesive experience across online and offline channels.

Pro Tip:

Write email and follow up copy for your sales team. You can assign pre-drafted templates for your touches too!



Step 4: Enable and Execute

Be sure to hold a kickoff with all relevant stakeholders or team leads. Draft templated copy for individual reps to use in their outreach and keep them informed of the timeline and steps (i.e. give them a heads up when you are about to hit send on something that will go to the audience so they know what communications are coming to their contacts).

Step 5: Measure & Share Results

Create regular feedback loops with sales reps highlighting both the aggregate successes and anecdotal success within individual deals. Share them in weekly or monthly team meetings in order to maintain momentum, optimize workflows, and continue driving sales and marketing alignment around these campaigns.

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Here is a shortlist of success metrics you should track both at the send level and down the funnel.

- Response Rate (# Addresses Confirmed / Total # Sent)*100
- Response to Opportunity Rate (# Responses / Total Ops Source)*100
- Pipeline Sourced by Campaign and Pipeline Influenced (# of Ops and ARR)
- Closed Won Revenue (# of Ops and Total ARR)

Success Story

Scott Haney, revenue operations at **Chili Piper**, focuses on enabling his sales team with tools that create net new sales opportunities across the buyer's journey. The sales team started to gain traction in influencing pipeline by sending branded Chili Piper hot sauce to their prospects. However, sending manually was proving to be difficult as it was time-consuming, preventing them to send at scale. Sendoso removed all of the manual work around Chili Piper's sending campaigns by allowing them to integrate sending into their SalesLoft cadences, setting up a 3 step play as pictured below:

ACTIVATE THE SEND	SEND DELIVERS	HOLD MEETING
Rep emails prospect letting them know they'll receive a gift in a few days	Sendoso automatically alerts rep of delivery. Rep calls prospect to book meeting.	Rep sends automated $5 coffee eGift day of meeting to ensure prospect attends

Since implementing Sendoso, Chili Piper has been able to scale their programs to reach 4X the amount of prospects than they were able to before, resulting in a **23X increase in influenced pipeline**. Additionally, the use of the coffee eGift reminder resulted in **33% increase in meeting show rates**.Click here to read more about their campaign.

Happy sending! Visit sendoso.com to learn more.