

FROM DARKNESS TO LIGHT:

Illuminating SnapLogic's Sales & Marketing Funnel with RevSure

TOP BENEFITS:

Improved insight and analytics into the entire sales funnel

“Three-click” simplified access to data analysis and reporting

Enhanced collaboration and alignment across teams (finance, marketing, and sales)

Defining a Return on Investment

How often does marketing come up with a great campaign only to be told to pare down the idea because of the budget? Too often, finance teams can find themselves at odds with marketing and sales teams. Since finance teams are ultimately accountable for what’s being spent, they too often have the unpleasant task of telling marketing and sales teams no.

But AJ Patel, Senior Director of Finance for SnapLogic, views his role differently. He focuses on how he can say yes, and in order to say yes, he needs to know that any investment will have the right return.

“It’s not my job to say no. My job is to say, ‘If I give you this, what can we get back?’ If it gives us the right return, then we’re going to move forward and invest.”

For Patel, making that happen comes down to building relationships and reaching a shared understanding. That’s why he prefers sitting with marketing and sales. Because they’re most successful when they’re all focused on the same goal: Increasing return on investment.

But many times finance, sales, and marketing don’t have the same goals. They focus on their individual portions of the funnel instead and thus aren’t working together as efficiently as they could be.

In order to get everyone on the same page so Patel could start saying yes, SnapLogic needed granular insights on their full, end-to-end funnel.



SnapLogic is the leader in generative integration. As a pioneer in AI-led integration, the SnapLogic Platform accelerates digital transformation across the enterprise and empowers everyone to integrate faster and easier.

Whether you are automating business processes, democratizing data, or delivering digital products and services, SnapLogic enables you to simplify your technology stack and take your enterprise further. Thousands of enterprises around the globe rely on SnapLogic to integrate, automate and orchestrate the flow of data across their business.

Headquarters

Palo Alto, CA USA

Industry

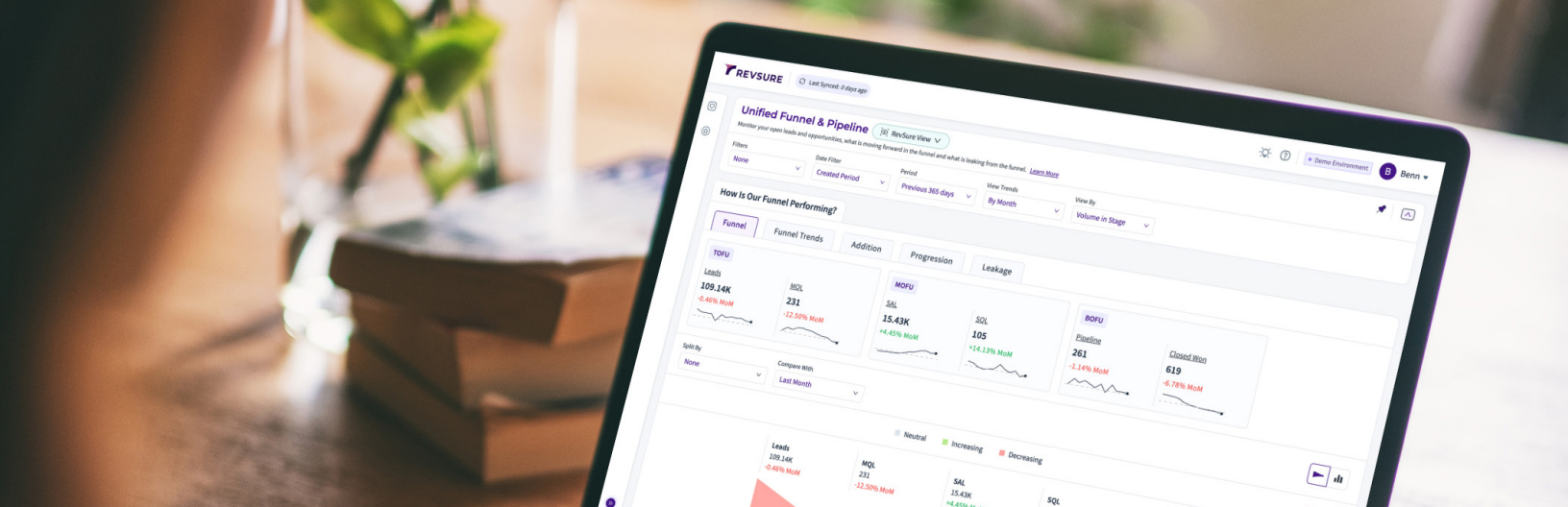
Cloud Integration Software

Company Size

300+ Global Employees

Website

snaplogic.com



Charting a Clearer Path to ROI

Patel is responsible for supporting the go-to-market team, including the CMO, as they drive growth responsibly at SnapLogic. This means keeping a close eye on the return of all investments in order to make wise decisions and continue growing in the right way. In order to accomplish this, he needed more detailed insights into the full, comprehensive funnel instead of piecemeal analysis performed by individual teams.

Before RevSure, SnapLogic knew at a high level where they were spending money and what they were getting out of it, but they didn't know which individual pieces of their strategy were driving that return. They needed better visibility into which marketing investments were bottom-of-funnel, direct pipeline drivers and which investments were delivering top-of-funnel awareness benefits.

Even so, getting to this high level understanding of their pipeline data took a lot of work. In fact, the SnapLogic teams were living in "spreadsheet hell." Each team had their own way of looking at the data and understanding it, leading to contrasting opinions that made planning difficult.

"If you asked three people in this company the same question, you'd get six different answers."

Each team had a different process for funnel reporting, and though they were all right in some way, none of them provided a view of the full picture. This was because each team would look only at the portion of the funnel they considered their own. For instance, marketing would look at leads and pipeline generation while sales would study sales accepted leads. Data consistency made finding a fix for any problems that arose difficult.

This left Patel and his finance team as the only ones focused on the big picture and how each piece of the puzzle was connected. They were struggling to understand where their leads were going and how they were transitioning quarter to quarter. Since they didn't have a full funnel report, their ability to make strategic decisions was compromised.

"It's not my job to say no. My job is to say, 'if I give you this, *what can we get back?*'"

AJ Patel, Senior Director of Finance, SnapLogic

98%

"I can go into RevSure and see the campaigns we've done that have led to a 98% probability of closed won deals."

"We didn't have any type of feedback loop in place to help marketing understand how leads were performing in order to make wiser decisions when planning."



AJ Patel
Senior Director of Finance
SnapLogic

Transforming Sales Analytics

When the team discovered RevSure, the SnapLogic leaders were immediately impressed. RevSure was the only tool that took the end-to-end funnel into account. While other tools exist that focus on later stages of the sales funnel, those tools don't offer comprehensive insights at the top and middle of the funnel, to match RevSure's capabilities.

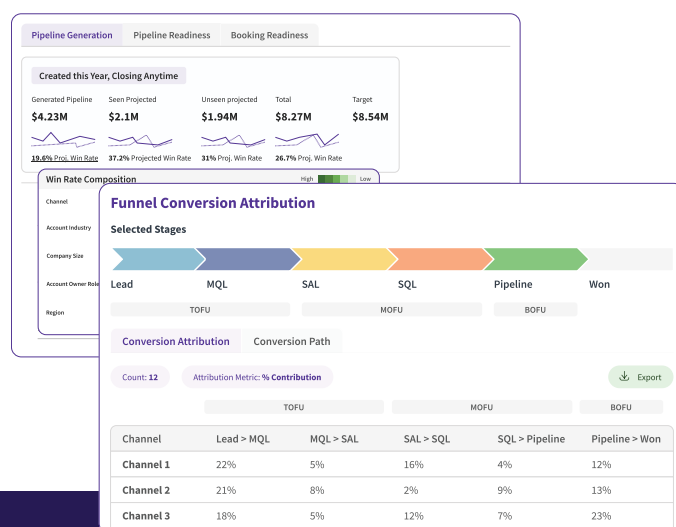
RevSure and SnapLogic also share a customer-first ethos that resonated with Patel during the implementation process. If and when SnapLogic finds a gap in helping a customer solve problems, they prioritize solving that problem. Patel recognized that RevSure had a similar dedication to customers and it gave him and his team further reason to invest.

“One of the best things about RevSure is the culture. The RevSure team has been amazing to work with.”

For instance, during the onboarding process, the SnapLogic team wanted to know how well they were tracking toward their goals and they also needed to know that they were setting goals based on reliable data, including historical performance. The RevSure product team was able to get that feature up and running in weeks, not months.

When the Head of Sales, Jonathan told Patel they would build the feature in June, Patel joked that he'd expect it by September since, as many tech companies know, it often takes longer than expected to ship a feature. But the RevSure team doubled down and sure enough, they launched the new feature in June.

What impressed Patel even more than the technical ability of the RevSure team was their responsive attitude. When SnapLogic asked for a feature, RevSure saw the value in the request, knowing that if one customer wants a feature, others probably do too.



Results: Illuminating the Funnel

With RevSure in place, SnapLogic finally has the full funnel insights they've been searching for, without the spreadsheet hell. According to Patel, "The end-to-end funnel is usually a giant black box, and RevSure has been a big flood light that illuminates every nook and cranny of the funnel." Data that's normally obscure and difficult to obtain has been made clear and simple.

They now have data on every piece of their journey, including which leads are transitioning through the funnel and which ones aren't. Even better, they're able to analyze why they're behaving this way and how they can improve their processes to get the outcomes they want. Now that they have granular data, they've been able to analyze the end-to-end funnel in order to locate any weak points. They're even able to get their teams aligned on a fix.

“We know how things are moving across the funnel, what's moving forward, what's moving back, what's staying stagnant.”

SnapLogic's teams have also gained key insight into the timing of their funnel. If they spend a certain amount of money today, they know what they'll get back and also when they'll see that ROI. This information has shown them how to target leads that yield a faster return. Being able to predict the timing of the spend is key information that makes planning easier and leads to them hitting more goals.

“From leads to bookings, there's not a metric I've thought of that I can't get out of the tool today.”

The SnapLogic team has been so impressed with the visibility into their funnel, Patel has already suggested RevSure to friends.

Increasing Performance Across Teams

With RevSure serving as their one source of truth for funnel insights, every team is aligned on their goals and solutions. And they reached this alignment without having to wade through spreadsheet hell.

“I can go into RevSure and see the campaigns we’ve done that have led to a 98% probability of closed won deals. I now know exactly what levers we can pull to increase our pipeline.”

In fact, they’ve been able to increase performance across multiple teams with the insights they’ve gleaned from RevSure. The marketing team has learned the specific marketing mix that leads to more revenue for the company, allowing them to invest more in the tactics with the most return. The sales team, too, has been able to make improvements to their processes for better results.

Accurate predictions enable their teams to manage their goals better and ultimately exceed more of them. As they plan for the future, they now know where to set goals realistically instead of making promises that may or may not be possible. Predictability of the business is extremely important to their own operations as well as to their investors. Accurately forecasting where they’ll end the quarter helps them end more quarters where they want to be.

Reduce your CPA

- Track conversion at every stage
- Measure effectiveness and ROI of each channel, campaign, or ad
- Focus on the right spends and effort

Demand Generation Effect
Recommendations

Filters: None | Date Type: Campaign Start

| Campaign Type | Campaign Name |
|---------------|-----------------------|
| Website | Pathfactory Analytics |
| Conference | Annual SKO 2023 |
| Email | Prospect Healthcare |
| Webinar | Risk Management |
| Partners | Lighthouse Promotio |

First Touch Campaign

Top 3 Campaign Names with HIGHEST 'Projected Booking Value' for Campaign Start Date: 'This Year'

| | |
|------------------------|---------|
| 1. Treadstone Campaign | \$25.3K |
| 2. Bellagio Campaign | \$3.5K |
| 3. Operation Neo | \$2.8K |

Last Touch Campaign

Top 8 Campaign Types with HIGHEST 'Generated Pipeline Volume' for Campaign First Engagement Date: 'Previous Quarter'

| | |
|-------------------|----|
| 1. Conference | 12 |
| 2. Nurture Emails | 10 |
| 3. Webinar | 7 |

From “Spreadsheet Hell” to Three-Click Insights with RevSure

More revenue for the company and more teams exceeding goals is a win-win for everyone. The effects of these insights have gone far beyond what Patel had hoped. They’ve been able to pinpoint weak points in their reporting processes.

In fact, RevSure has performed so well that many of the SnapLogic leaders have been surprised at just how well RevSure is delivering on its promises. Anyone who was skeptical during initial conversations is now coming around and seeing how this tool could help more teams and how it can be even more valuable to the organization.

Before RevSure, SnapLogic was forced to go through spreadsheet hell to get any insights that could help their business. Now, whenever they have a question, they only have to click three buttons to find the answer. It’s a much simpler process and the insights they’re getting are far more valuable. They can feel confident they’re getting data-backed, accurate insights that will drive strategic decisions and make everyone’s jobs a lot easier and efficient.

ABOUT REVSURE

RevSure is the only solution that enables modern marketing teams to build higher quality pipeline and crush their ROI through predictive intelligence, comprehensive funnel management, and full-funnel attribution. Learn more at www.revsure.ai