INDUSTRY
Product Adoption, Software, B2B

HEADQUARTERS
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CHALLENGES
Rapid expansion was causing growing pains such as the need to frequently change sales territories.

Manual lead distribution was time consuming and exacerbated by the company's hyper growth.

Limited resources meant Pendo was operating reactively, and the company needed a solution that could help it become proactive.

SOLUTIONS
LeanData Matching industry leading fuzzy matching algorithm to automatically match leads to existing accounts.

LeanData Routing enables custom routing rules, enabling the speedy delivery of leads to the right reps, increasing efficiency and accelerating response time.

LeanData Attribution accurately ties revenue to campaigns to create a common dataset that both sales and marketing teams trust.

RESULTS
Time to route and assign leads decreased from 90 minutes to 10 minutes on average—a reduction of 89%.

Incorrect lead assignment decreased by 50%.

Segment and routing changes are smoother and more efficient.

No longer reliant on developers thanks to LeanData's agile and user friendly interface.

Pendo's marketing and sales teams now work more closely together.

Pendo Optimizes Territory Management and Harnesses Rapid Growth with LeanData

- Feras Abdel, Director of Sales Operations and Tyler Crumpler, Senior Manager, Integrated Marketing

Pendo's robust integrated platform empowers digital product teams to build better products. The company has six offices worldwide and serves more than 1,400 customers from Fortune 500 companies and technology startups to educational institutions and nonprofits.

Pendo is quickly adding to its ranks of over 400 staff, and was named #73 on the 2019 Inc. 5000: The Most Successful Companies in America. The company also recently raised $100 million to expand geographically and add to both product and engineering teams as well as sales and marketing. To keep pace with its hyper growth, Pendo needed a scalable SaaS solution to optimize critical business functions, save time, and drive revenue.

A company evolving beyond its software

Pendo faced growing pains as it expanded, such as the need to adjust sales territories multiple times per year. Every staffing-related change affected account assignment, lead assignment, and lead routing, and the lead distribution process was manual and cumbersome.

Anytime a change was made, the operations team had to download a file of the affected records, change the ownership in Excel, then re-import the file into Salesforce. It took up to two hours to make an account executive change—and Pendo hired 100 new employees in the past fiscal year alone.

Pendo was evolving so quickly that it had limited time to analyze data, such as attribution insights, to learn which of its marketing efforts were most successful. The company needed a SaaS solution that could enable it to be proactive and agile, as well as provide visibility into which marketing and sales activities resonated with customers and prospects.

Finding a SaaS solution to support hyper growth

As Pendo's operations team gained greater insight into the company's growth strategy, it became clear how their day-to-day work was about to change, and that they needed a solution to help efficiently scale their efforts.

Pendo decided to look for a SaaS partner and based its search on several criteria. The solution needed to be agile and user friendly so the team could make changes quickly, as well as be the source of truth for both lead and account data. The product also had to be native to Salesforce and integrate with various tools such as Outreach.

"Our tech stack is very large, and we didn't want it to become unmanageable," Abdel said. "It's great that LeanData lives within Salesforce so we don't have yet another login to give to the team."

"
LeanData is directly impacting our bottom line by reducing the time it takes to contact our customers and leads and work our pipeline. That's dollars and cents right there."

- Feras Abdel, Director of Sales Operations

Pendo found that LeanData was the best fit for its needs. Today, the company uses LeanData Matching and Routing to ensure all leads and contacts get to the correct sales reps at the right time, as well as Attribution to optimize its marketing team's efforts.

"We try to be as agile as possible because the business changes every day, and you have to be efficient," Abdel said.

Accelerating operational efficiency

With LeanData's intuitive routing flows, Pendo can efficiently and accurately assign every single lead, contact, and account that comes into its system. Time to route and assign leads has decreased from 90 minutes to 10 minutes on average—a reduction of 89%.

Pendo primarily routes leads and accounts to SDRs and AEs depending on the account type and segment. The company has changed its segments and routing several times in the past year, and LeanData enables Pendo to operationalize these changes in an agile way without editing code. With LeanData, incorrect lead assignment has decreased by 50% because it no longer requires manual work or coding, which left a great deal of room for error.

"If you have a campaign where you get 2,000 leads, there is a monetary impact to how quickly those leads become pipeline generated, and how quickly that pipeline becomes revenue," Abdel says.

Pendo also used LeanData to set up territory management rules. Abdel's team worked with LeanData to learn how to build a territory segment and upload it into the system with the intuitive and user friendly software. LeanData helped Abdel's team through testing, and Pendo can now oversee territory management with ease. If an account executive changes territories, Abdel's team can oversee the adjustment rather than involving a developer, which would be less efficient and more costly.

Gaining visibility into marketing impact using attribution

Pendo's marketing team was also proactively looking to optimize their efforts contributing to the company's hyper growth. They were seeking a solution to identify which marketing efforts were moving the needle and impacting velocity and revenue. Given the foundation in place for Routing, it made sense to adopt Attribution as well.

With help from their LeanData services team, the Pendo team set up multi-touch attribution. Pendo now tracks KPIs such as pipeline attribution and compares the success of all marketing campaigns including events, emails, and webinars.

Pendo's analytics team created a business intelligence (BI) dashboard and integrated it with LeanData Attribution to optimize the analytics that both tools provide. The BI dashboard makes attribution data actionable and available to everyone on the marketing team, ensuring they're making the most of it.

Pendo was quickly able to find which marketing efforts were delivering the most value, it turned out to be the live demo webinars.

"Attribution gives us more impactful data than you can ever imagine," said Tyler Crumpler, Senior Manager, Integrated Marketing. "After we ran a few webinars, we used it and immediately saw the results. We were getting lots of high value registrations that generated lots of pipeline. Now, we run two webinars a month and we continue to see growth."

Having quick access to data that showed pipeline velocity and conversion rates also allowed Pendo to implement service level agreements with the SDR team for these specific leads.

A trusted partner

With LeanData, Pendo creates business rules and uses the solution to execute on them, rather than being forced to fit in to predefined software parameters. LeanData's flexibility and reliability has also helped bridge the gap between Pendo's marketing and sales teams goals.

"LeanData has proven itself within our company and has become a trusted source of routing for us," Abdel said. "For the experienced Salesforce user, LeanData is simply easier to use and a lot more scalable than other solutions."

LeanData is also responsive to questions from Pendo. Anytime Abdel reaches out to LeanData's team, they respond quickly and help set up the business rules that align to Pendo's objectives.

"After 10 years of experience in ops, I can say the absolute best thing about my relationship with LeanData is the customer service," Abdel said.

A strategic approach to support future expansion

Pendo expects its staff to continue growing at a fast pace, and LeanData will play a crucial role in supporting this expansion. As the company grows and evolves, it plans to rely on LeanData's best practices and use the product in a strategic way to inform how to optimize new sales territories and routing logic. Pendo will also continue to draw insights from LeanData's rich analytics to facilitate better and faster business decisions.

Abdel also wants to train more revenue operations staff as LeanData power users to build a world class team. "Our team is growing, and the impact we're having is growing. We touch every part of the business. Everyone needs an understanding of how we are using LeanData to ensure we're not working in a silo," he said.

" Without LeanData, we would not be able to handle influxes of leads and hit the growth metrics we have as a company."

- Feras Abdel, Director of Sales Operations

About Pendo

Pendo empowers digital product teams to build better products. Pendo's robust integrated platform enables its customers to understand product usage, collect feedback, measure sentiment, onboard users, and announce new features—all without requiring engineering resources.