

Elle Marie Pierce

PROJECTS PORTFOLIO - OUTCOMES YOU CAN EXPECT WHEN WORKING WITH ME



Client Services Executive - Exceeds Goals by \$5M

Company: WPP

Date: 2023

Project Type: Executive Leadership, Sales, Account Management

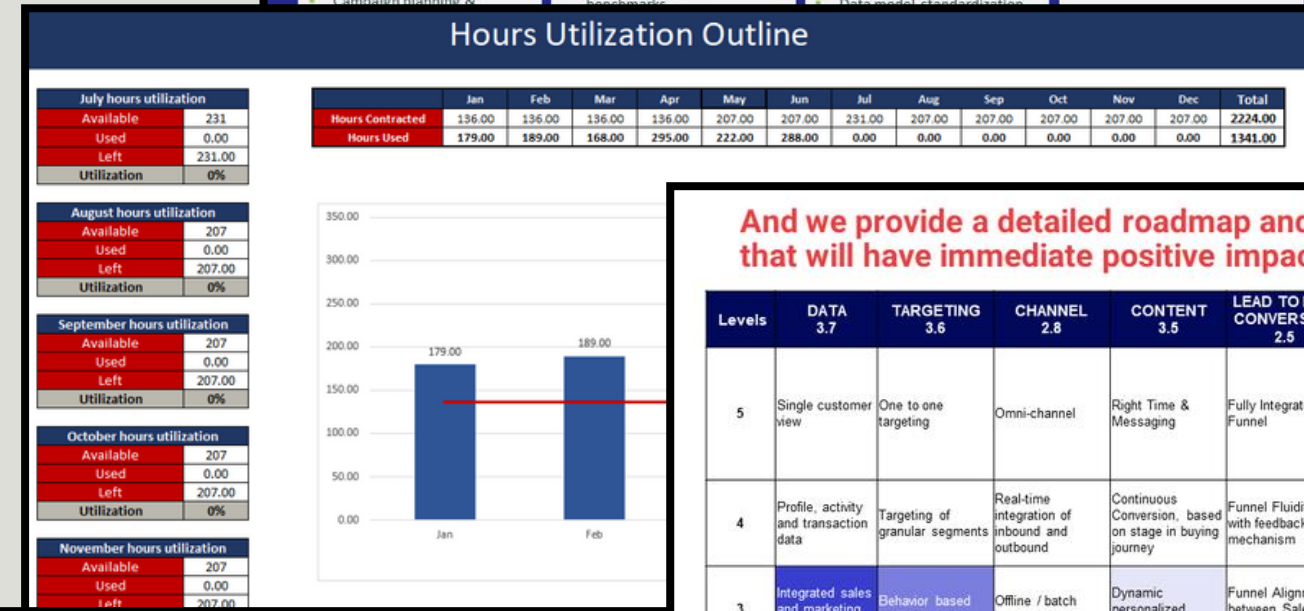
Project Activity: Proposals and Presenting, Technical Writing, Data Analysis & Reporting

Technical Expertise: Salesforce, Mulesoft, Marketo, Eloqua, Braze, Adobe, WordPress, Asana, Wrike, AI

Project Impact: Created and delivered Account Plans, Quarterly Business Reviews, Proposals and Pitch Decks for managed services, technical implementations, and assessments, including AI, Braze, Adobe platforms, Eloqua, Wrike, lead management frameworks, marketing maturity assessments, personalization, and customer journey lifecycle engagement. Managed contracts and renewals, budgets and utilization, and global teams for error-free production to ensure client satisfaction. Unlocked opportunities, exceeding goals by \$5M.

Our 5-step process to develop your lead management roadmap.
(Total project timeline = 6-8 weeks)

Lead Management Roadmap				
AUDIT	ANALYZE	PROPOSE	PRIORITIZE	PLAN
<ul style="list-style-type: none"> Stakeholder Interviews (up to 15 regional and market leads) Sales & Marketing processes System Integrations Data management Process documentation Campaign planning & 	<ul style="list-style-type: none"> Use cases, lead handoff and scoring GTM strategies Current business requirements Mapping to best practices & industry best-in-class benchmarks 	<ul style="list-style-type: none"> MarTech integrations to fill gaps based on future state needs Sales & Marketing Alignment, lead stages and scoring needs Process governance & management 	<ul style="list-style-type: none"> Short-term achievable milestones Future state needs Potential investment evaluation 	<ul style="list-style-type: none"> Specific initiatives and workstreams to increase lead management maturity Phased next steps & milestones Resource needs & allocation Plan delivered in a workshop with key stakeholders



And we provide a detailed roadmap and direct recommendations for next steps that will have immediate positive impact on your business.

Levels	DATA 3.7	TARGETING 3.6	CHANNEL 2.8	CONTENT 3.5	LEAD TO PIPE CONVERSION 2.5	ANALYTICS 3.1	TECHNOLOGY 3.5	CX 3.0	PEOPLE 4.1	PROCESS 3.9
5	Single customer view	One to one targeting	Omni-channel	Right Time & Messaging	Fully Integrated Funnel	Revenue predictability and funnel forecast	Integrated omni-channel, sales and marketing platforms	Optimized CX across all channels using insights, predictive models delivering 1:1 personalized experience	Clearly defined plan for skills and aligning KPIs against modern marketing trends	Processes are defined, understood, optimized, measured and reported, to drive business goals
4	Profile, activity and transaction data	Targeting of granular segments	Real-time integration of inbound and outbound	Continuous Conversion, based on stage in buying journey	Funnel Fluidity with feedback mechanism	One view of the truth	Integrated sales and marketing platforms	Formalized CX program covering all segments and channels	Right-resourced with clear R&R and periodic review of KPIs	Processes are documented, followed regularly, measured and optimized
3	Integrated sales and marketing database	Behavior based targeting	Offline / batch integration	Dynamic personalized content	Funnel Alignment between Sales & Marketing	Data driven decisions	Non-integrated marketing and CRM platforms	Basic CX program for one or two channels implemented	Right-resourced with right skills but no clear definition of R&R or KPI	Processes are documented, followed regularly and measured
2	Marketing data warehouse	Demographic based targeting	Uncoordinated outbound and inbound comms	Content driven by Segments	Basic BANT Lead Qualification	Marketing Dashboards	Partial, separate automation	Issues and challenges with CX identified	Right-resourced, but inadequate skills for Modern Marketing (skills only in some areas)	Some processes are documented and followed regularly
1	Multiple marketing lists	Batch & Blast	Single channel outbound communication	Generic Content push to database	Lead Dumping to Sales with no qualification	Basic Metrics	Disparate marketing technology/ no technology	No or little awareness about CX / No structured program to address CX	Right-resourced, no skills for Modern Marketing	Very few processes are documented and followed on a regular basis

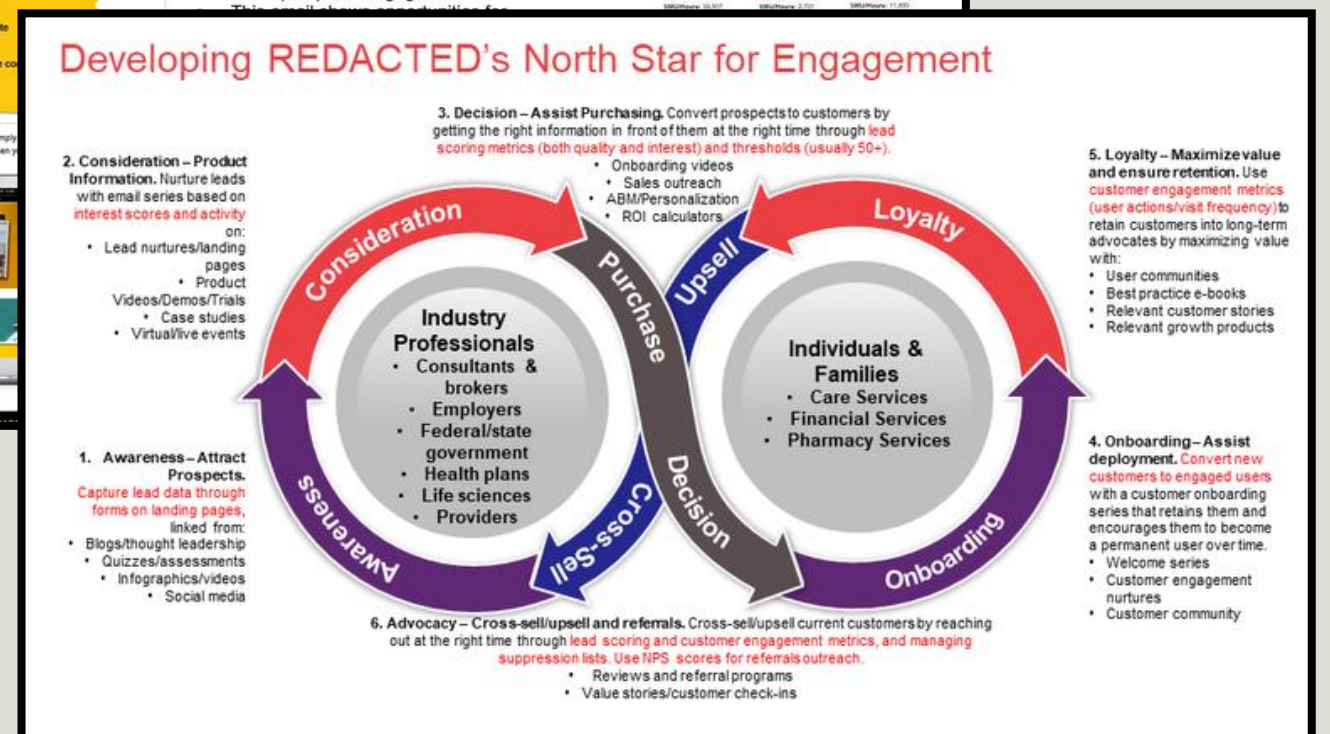
Legend: 100% Mature, 75% Mature, 50% Mature, 25% Mature, 0% Mature

Best Performing Email- Unique Click Rate

Region - UK
Q2_22_PCC_Activation_Campaign June Resend
Subject line: Your £25 Cat merchandise gift certificate
Unique Open Rate: 80%
Unique CTR: 25%

Takeaways

- This is a good email to warm prospects engaged.





\$300k to \$4M - Project Management and Team Leadership

Company: WPP

Date: 2023

Project Type: Client Services & Account Management

Project Activity: Project Management, Team Leadership

Technical Expertise: Adobe Experience Cloud, Zoho Projects, Excel, SharePoint, PowerPoint

Project Impact: Elevated a \$300k account to a \$4M powerhouse (13X growth) in just 3 months, securing its position as the company's top-performing account, by overhauling team collaboration, project management, and client engagement strategies.

CHALLENGE: At WPP, I encountered a significant challenge: a \$300k account underperformed due to inefficiencies and miscommunications between offshore and US teams, exacerbated by convoluted project tracking systems.

APPROACH: Recognizing the urgency, I initiated in-depth discussions with team leaders and project managers to diagnose operational weaknesses and areas prone to errors. This led to the implementation of a comprehensive overhaul of our project management approach, leveraging Zoho and SharePoint for enhanced clarity and coordination.

STRATEGY: To bridge team gaps, I established daily collaborations with the newly appointed India-based project manager and prioritized transparent communication with the client and team leads, ensuring a consistent approach to project execution. Weekly updates and email summaries maintained synchronicity across our projects, in addition to weekly meetings across various client teams.

EXECUTIVE LEADERSHIP: Following the performance enhancements, I delivered an on-site QBR to the client and spent time getting to know them. Once I returned to the office and executed on the promises pitched during our meeting, the \$4M deal was closed.

RESULTS: These efforts culminated in a remarkable outcome—a 13-fold increase in the account value, soaring from \$300k to \$4M within 3 months. This transformation solidified the account as the company's top performer, showcasing the impact of strategic leadership, effective staff deployment, and enhanced collaboration on exponential growth.



Technical Campaign Analysis

Company: WPP

Date: 2023

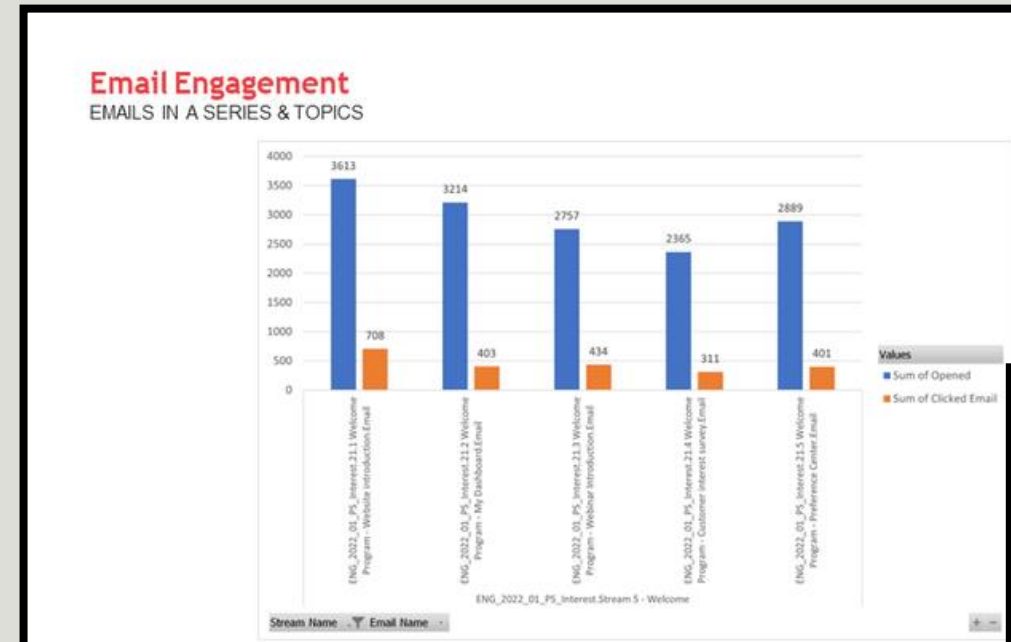
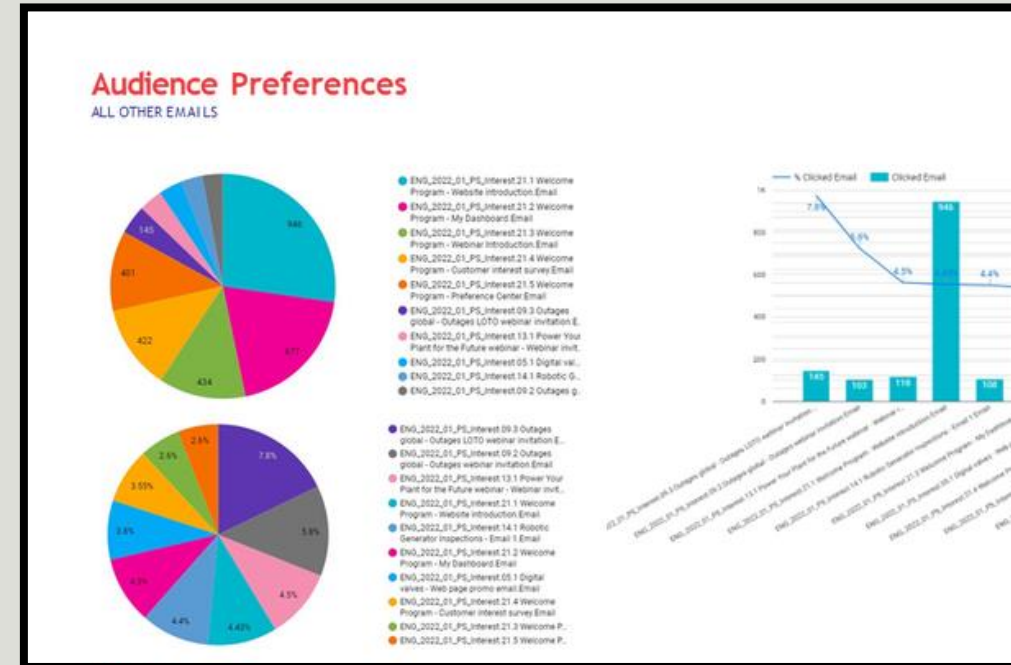
Project Type: Client Services & Account Management

Project Activity: Data Analysis & Reporting, Presenting

Technical Expertise: Marketo, Zoho Projects, PowerPoint, Excel, PowerBI

Project Impact: Revived a pivotal client relationship, ensuring a \$200k contract renewal through meticulous technical analysis of marketing campaigns.

Sample Slides



Email Analysis

UNSUBSCRIBES & UNSUBSCRIBE RATE BY EMAIL | STREAM

- Stream 3 - Planning for the future - had 8 unsubs at the highest rate (.52%)
- The list is larger than Stream 4 but a fraction of Asset Management and Outage Planning, both with unsub rate at .06%
- Emails within this stream with highest unsub rate are the PressureWave Interactive calculator and flipbook
- This content is very targeted - more than most other emails, so evaluate the actions taken for someone to be included in the list - are they interested in PressureWave Technology? If not it's completely irrelevant, and a quick unsubscribe
- But 8 subscribes for such targeted content when engagement is pretty good, is not much to worry about.

Are there similarities in emails driving clicks?

OPEN, CLICK & CLICK TO OPEN

- Since the invite emails are driving the most clicks, it seems like more enticing offers could improve the click rate on other emails
- Many of the other emails drove readers to generic web pages or landing pages with lots of different content - but trying picking one very specific content of offering and repurposing it into an email offer.
- For example, one email had a CTA to this landing page: <https://www.ge.com/gas-power/services/steam-turbines/upgrades/valve>
 - Header info shouldn't be on landing pages where you want a lead to take a specific action
- Which has this infographic: https://www.ge.com/content/dam/gepower-new/global/en_US/downloads/gas-new-site/services/steam-turbines/digital-valves-infographic.pdf
- In that email - the infographic could have been included as a clickable image or the CTA offer itself (just make sure you tag anyone who clicks as a conversion for the next offer)
 - Could turn it into a powerpoint - downloadable offer
 - Powerpoints can be turned into a video - social
- All-in-all for more clicks: More targeted content offer and specific CTAs that align with the subject line

Are there any topics that are most successful/driving the most interest?

EMAILS IN A SERIES & TOPICS OF INTEREST

- The very relevant customer content is receiving the most interest and engagement
- How do you maintain this relevancy throughout the introduction of new topics?
 - Try tying each new topic to the introductory content
 - "Next step in your GE onboarding journey"
 - "We noticed you forgot to X during onboarding"
 - Make it seem like it's necessary for them to take action on it as a customer
 - "Don't lose access"
 - "Get your free product upgrade before it goes away" (for anything that has a free intro and then a paid upgrade offer)
 - "Activate this feature to save X dollars"
 - "We noticed you haven't upgraded your X, every day this could be saving you X dollars"
- Do you have a customer training series? This could be a good way to introduce your new offerings while helping them with the ones they're already using. Have an introductory offer at the end for anyone who wants to try an upgrade.



\$80M ACCOUNT-BASED MARKETING CAMPAIGN

Company: NielsenIQ

Date: 2022

Project Type: Marketing and Advertising Campaigns

Project Activity: Lead Generation

Technical Expertise: Salesforce CRM, Salesforce Marketing Cloud, Microsoft Dynamics, HubSpot, PowerPoint, Excel, Facebook, Twitter, LinkedIn Organic and Paid Ads

Impact Statement: Accelerated business growth by developing an \$80M book of business from 231 medium-sized target accounts through customized marketing campaigns, strategic SDR outreach, and executive-level engagement.

CHALLENGE: Develop a substantial book of business targeting medium-sized enterprises within defined zone of success. To achieve this, I initiated a comprehensive strategy that involved conducting in-depth research on 231 target accounts, delving into industry trends, challenges, and their specific aspirations. This groundwork was essential in crafting bespoke, story-driven pitch decks that resonated deeply with our prospects, aligning our offerings precisely with their needs.

APPROACH: Methodical and data-driven. We meticulously verified end-user and executive contacts within these 231 target accounts, employing third-party resources to ensure accuracy and relevance. This enabled us to tailor our outreach effectively, maximizing the impact of our communication.

STRATEGY: A key component of our strategy was the creation of an SDR Outreach program specifically targeting these accounts. I took the lead in training our SDRs and sales teams, equipping them with the knowledge and tools necessary to engage these prospects successfully. This training was not just about imparting information but about fostering a deep understanding of the value we could offer to these businesses.

EXECUTIVE LEADERSHIP: Furthermore, I developed and regularly updated transformation plans for medium businesses, ensuring these plans were not only actionable but also aligned with the evolving needs and challenges of our target accounts. Regular updates and presentations to executive leadership ensured transparency and alignment at every stage of the process.

RESULTS: The result of these concerted efforts was the acquisition of 231 target accounts, worth \$80M in revenue. This achievement not only reflects the success of our targeted marketing and advertising campaigns but also underscores the effectiveness of a holistic approach to business development, from strategic research and customized pitch development to targeted SDR outreach and executive engagement.

Recent experience has brought health and security into focus

What is more important in next 12 months?
Nett – More important minus less important

Category	Percentage
Mental Wellness	65%
Physical Wellness	63%
Saving for unforeseen circumstances	59%
Financial stability	59%
Planning for the future	58%
Access to basics for all	55%
Work Life Balance	53%
Relationships & emotional support	53%
Sustainability	52%
Ability to socialise with friends/family	49%
Access to trustworthy media	46%
Career/Education/Advancement	42%
Caring for society/vulnerable groups	41%
Local Community Support	39%
Access to technology	38%
Location of work/study	37%
Access to in-home entertainment	24%
Traveling locally	15%
Attending out of home events	-22%
Traveling globally	-23%

Source: NielsenIQ 2022 Consumer Outlook Survey, Dec 2021
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Majority of markets will exercise caution to some degree

Market	Will carry on if without fear of COVID-19	Follow local health guidelines and live with some caution	Take precautions and avoid certain settings
Global	16%	47%	33%
Mexico	5%	52%	41%
Indonesia	7%	45%	47%
Thailand	8%	43%	47%
Brazil	7%	43%	47%
South Korea	7%	57%	31%
Spain	11%	42%	39%
Italy	12%	44%	40%
South Africa	14%	42%	41%
Singapore	16%	52%	28%
France	16%	41%	37%
Canada	17%	49%	27%
Poland	15%	45%	29%
Australia	21%	52%	20%
United Kingdom	21%	50%	21%
India	31%	43%	23%

Source: NielsenIQ 2022 Consumer Outlook Survey, Dec 2021
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Readjusted Realities 2022

What environmental impacts might we expect in 2022?

Consumers already feeling the pinch of higher prices
56% Say normal weekly shop costs more than it did six months ago

Market	Monitor cost of overall basket	Stop buying certain products	Select lowest price irrespective	Buy economy packs	Buy whatever is on promotion	Opt for Private label	Select lowest price irrespective	Select lowest price from repertoire
Indonesia	Monitor cost of overall basket	Stop buying certain products	Select lowest price irrespective	Buy economy packs	Buy whatever is on promotion	Opt for Private label	Select lowest price irrespective	Select lowest price from repertoire
Mexico	Monitor cost of overall basket	Stop buying certain products	Select lowest price irrespective	Buy economy packs	Buy whatever is on promotion	Opt for Private label	Select lowest price irrespective	Select lowest price from repertoire
South Africa	Monitor cost of overall basket	Stop buying certain products	Select lowest price irrespective	Buy economy packs	Buy whatever is on promotion	Opt for Private label	Select lowest price irrespective	Select lowest price from repertoire
Spain	Monitor cost of overall basket	Stop buying certain products	Select lowest price irrespective	Buy economy packs	Buy whatever is on promotion	Opt for Private label	Select lowest price irrespective	Select lowest price from repertoire
United States	Monitor cost of overall basket	Stop buying certain products	Select lowest price irrespective	Buy economy packs	Buy whatever is on promotion	Opt for Private label	Select lowest price irrespective	Select lowest price from repertoire

Source: NielsenIQ 2022 Consumer Outlook Survey, Dec 2021
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Factors drive new opportunities

Statement	Percentage
Trying to live a healthier life	44%
I do more household chores	35%
Consume more media/entertainment content	32%
Prefer to shop at local stores	31%
Open to trying new products/service that make working from home a better experience for me	30%
More discerning about what I eat	28%
The way I prepare meals is different than pre-COVID	25%
I share meals/breaks with my household throughout the day	25%
Fuel more connected with nature/outdoors	25%
I shop ahead/pretty stock to avoid being impacted by out of stocks/products being unavailable	24%
I have more time to seek out best value options	24%
I shop online because I'm home to receive deliveries	23%
I shop online to limit my exposure to risk in store	23%
I consume very different products depending on where I work/study (e.g. home vs office)	22%
I snack more	22%
I eat leftovers more often	22%
I shop in physical stores more as can't rely on online delivery times	22%
I get more meals delivered/takeaways	22%
I am less concerned about my appearance	21%
I am doing composting/recycling more	21%
I have used live streaming on social media channels	21%
I find it hard to eat/drink healthy	20%
I would live in a different location if I could	20%
Buy a different set of products that online vs in-store	19%
I prefer to buy local brands	19%
I get bored eating and drinking the same things	19%
I eat and drink more quantity and occasional	18%
It's hard to balance home and work demands	18%
I spend less money by not going to work	17%
Shop at different store locations than I did pre COVID-19	13%
I use online community/group buying	12%
Don't pick up groceries on my commute as much as	12%
I have changed living location since the onset of	11%
I have shopped via social media channels	11%
Many stores I usually shopped in have closed	9%

Source: NielsenIQ 2022 Consumer Outlook Survey, Dec 2021
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Consumer Outlook 2022

How are consumers approaching the year ahead?

With many accepting COVID will be a factor in their lives over the next 12 months, most will continue to exercise some caution.

- 16% will carry on their normal lives without fear of COVID
- 47% will live with some caution
- 33% will follow stricter vigilance, take precautions and avoid certain settings

Vaccines: Vaccine uptake remains a driver of fault lines in the global recovery, reinforced by the resurgence of the pandemic through new variants.

Dec 2021: 80% Vaccinated/partially, 6% Not, but will when available, 7% Had COVID, 1% Undecided, 4% Prefer not to answer, 1% No intention

Boosters: Acceptance of boosters give recovery confidence amid surging cases and new variants.

Willingness to get vaccine booster: Asked of those who are vaccinated, or willing to be

Don't know, 7%
No, 5%
Yes, already have, 31%
Yes, planning to, 56%

Source: NielsenIQ 2022 Consumer Outlook Survey, Dec 2021
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LEAD GENERATION RESULTS

3 downloadable reports

89 leads

\$250K revenue



Dear %%first_name%%,

Lead your organization in the right direction despite global environmental changes. Share these charts and advice on what consumers want today:

- What is most important to consumers today ([Chart](#))
- Attributes that matter most, and least, to consumers now ([Chart](#))
- Consumer behaviors driving consuming, living, and shopping actions ([Chart](#))
- How to prepare for upcoming consumer behaviors ([8 Tips](#))

[CLICK HERE](#) to download all the charts and tips in a single report.



Download the Special Report

For more information on 2022
consumer spending plans



MARKETING AND ADVERTISING CAMPAIGN RESULTS

231
target prospect accounts

70
target customer accounts

\$80M
revenue



EMAIL EXAMPLE

Subject: HTML Proof - 📄 Your retail landscape cheat sheet is here

Dear %%first_name%%,

Times are tough for all CPG manufacturers right now. Go into your next meeting with these critical talking points:

- Ongoing pressures facing the retail landscape
- What percentage of consumers are already feeling the pinch of higher prices
- What savings tactics consumers value most
- Consumer spending intentions for the next 12 months

[CLICK HERE](#) to download the mini report for your next planning meeting.

SDR OUTREACH EXAMPLE

Thought Leadership Campaign (Consumer Trends): SDR Outreach

George,

Following up on my previous email where I shared [NielsenIQ's](#) 2022 Global Consumer Outlook, I wanted to check in and see what questions you and the GTU, Inc team had regarding the insights included in the deck.

I have attached a U.S. specific version of the deck where [NielsenIQ](#) provides insights into:

- How consumers are approaching 2022
- What consumer spending intentions are for the next 12 months
- How manufactures like SalesLoft, Inc can unlock new consumption opportunities based on new consumer priorities

Our team would be more than happy to set-up time to review the insights in further detail and help GTU, Inc understand how they can address the constantly challenging FMCG backdrop.

Please feel free to reach out with any questions or if our team can be of any assistance as GTU, Inc tackles their 2022 objectives.

~ Kristin

TARGET AUDIENCE DEVELOPMENT

- Acquired 231 target accounts worth \$80M in revenue from prospects and customers within company databases.
- Verified end-user and executive contacts within 231 target accounts utilizing third-party resources.
- Created SDR Outreach program targeting 231 accounts and trained SDRs and sales teams.



STRATEGIC CONTENT MARKETING

Company: NielsenIQ

Date: 2022

Project Type: Marketing and Advertising Campaigns

Project Activity: Technical Writing and Graphic Design

Technical Expertise: Salesforce CRM, Salesforce Marketing Cloud, Microsoft Dynamics, HubSpot, PowerPoint, Excel, Facebook, Twitter, LinkedIn Organic and Paid Ads

Impact Statement: Orchestrated a business unit transformation, training leaders and deploying targeted programs, generating \$250k in immediate revenue through strategic lead generation, including authoring eBooks, developing microsites, and creating targeted nurturing programs.

CHALLENGE: Spearheaded a multifaceted lead generation strategy aimed at capturing and nurturing Marketing Qualified Leads (MQLs) with a direct impact on revenue.

APPROACH: Combine the creation of targeted eBooks, the development of engaging microsites, and the implementation of comprehensive lead nurturing programs. These efforts were designed not only to attract our target audience but to deeply engage them, guiding them through the sales funnel with content tailored to their specific needs and interests.

STRATEGY: The centerpiece of this initiative was the authoring and designing of eBooks that addressed pressing challenges and opportunities within our target market. These eBooks served as a key resource in establishing our thought leadership and enhancing our brand's credibility. To complement this, I developed microsites that provided a focused, branded experience for visitors, further nurturing their interest and guiding them toward conversion.

EXECUTIVE LEADERSHIP: These experiences underscore my ability to not only generate leads through strategic content marketing but also to drive significant business transformation through targeted strategy development and leader training, resulting in substantial revenue opportunities.

RESULTS: The success of these tactics was measurable and significant, resulting in the generation of 89 leads and identifying a \$250k opportunity, a testament to the effectiveness of our targeted engagement strategy. Parallel to these efforts, I developed a strategic plan for an end-to-end transformation of our business unit, focusing on targeted list creation and the promotion of thought leadership programs to these lists. This comprehensive strategy was not static; it was continually evaluated and revised based on implementation results to ensure its effectiveness and relevance. By training business unit leaders on this transformation strategy, we were able to foster a unified approach towards achieving our objectives, immediately generating a \$250k opportunity.

LANDING PAGE EXAMPLES

Download the Mini Consumer Outlook 2022 Report

Want to learn how consumers are approaching COVID in 2022?

Complete this form to download the report with 2022 data on:

- How consumers are approaching COVID
- How consumers feel about vaccinations
- How consumers feel about boosters
- How level of caution each global market is exercising

CLICK HERE to download your report.

The 2022 state of consumers

As we enter the third year of Covid-influenced life, signs begin to show that the world is preparing for an endemic approach to COVID-19. Authorities have begun to shorten isolation periods for the sickened and are reducing classroom quarantine protocols to avoid major disruptions in schools, and record high case numbers. While governments must decide what the line is right to start officially "living with Covid," we know that shoppers have been defining their own moving on mindset for months, and there are some recurring themes in consumer attitudes.

Shoppers have been locked with navigating supply chain challenges, employment disruptions, and inflation-influenced budget constraints as of late, but these are just the latest factors in a long series of disruptions.

Disruptions drive re-evaluation

As a result of these disruptions, consumers have re-evaluated what matters to them, and are seeking shopping experiences and products that cater to their new needs. In fact, our recent NielsenIQ 2022 Consumer Outlook online survey reveals that 54% of global respondents believe that their priorities, and resulting shopping habits, have been impacted to some degree by COVID-19. This includes 30% who feel they have a radically different set of priorities than they had in 2019. Consumers, continuously equipped by ordinary and extraordinary challenges, will show their willingness to pay and search for products that address real-life needs and priorities. Retailers and manufacturers who want to succeed going forward will have to keep up as consumers continuously redefine what "living with Covid" means to them.

With many accepting COVID-19 will be a factor in their lives over the next 12 months, most will continue to exercise some caution

If COVID-19 impact remains over the next 12 months, what would you do?

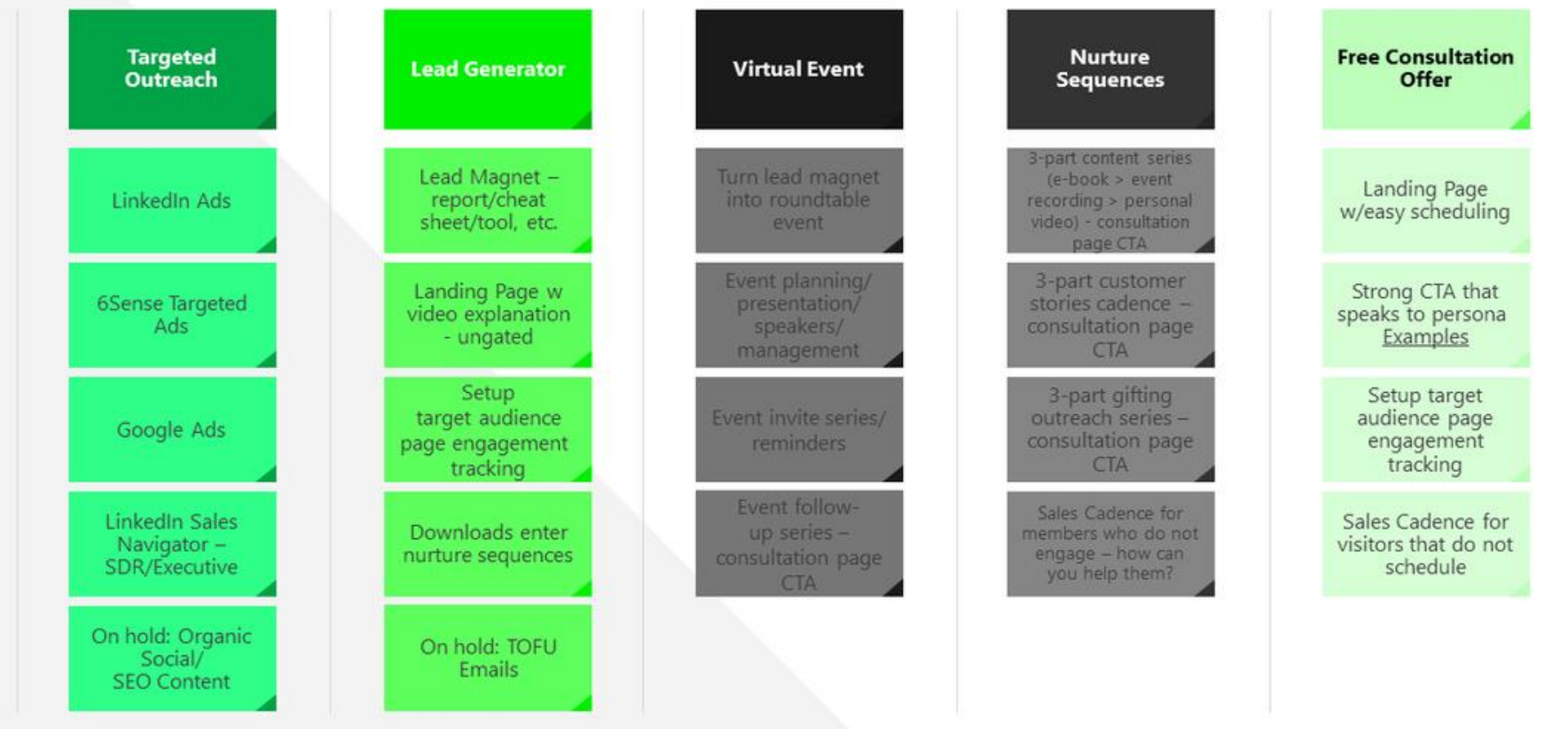
Impact that COVID-19 has had on daily living and priorities

Vaccinations support a cautious confidence renewal

Understanding how consumers plan to re-engage with the world begins with how careful they're being. Globally, nearly half of those who were vaccinated with some caution if COVID-19 continues to impact their market in the next 12 months. 33% will be more vigilant, saying they'll continue to take precautions and avoid certain settings even if positivity rates dip a bit, while only 19% said they will carry on with life without fear of COVID-19.

80% of vaccinated respondents, who likely feel protected in their safety, say they are more likely to be cautious compared to 58% of those who are unvaccinated. Meanwhile, 30% of unvaccinated consumers say they will live without fear of COVID-19 compared to 14% of vaccinated. But the vaccinated who have already received a booster shot are showing renewed confidence with 23% now trying to carry on with the

Persona-Based Sales Funnels



STRATEGIC CONTENT MARKETING RESULTS

22 persona-based sales funnels

6 month campaign plan

23% click through rates





\$8M GLOBAL MARKETING TEAM LEADERSHIP AND EVENT MANAGEMENT

Company: Duetto

Date: 2021

Project Type: Event Management & Omnichannel Campaigns

Project Activity: Lead Generation

Technical Expertise: Salesforce CRM, HubSpot, PowerPoint, Excel, LinkedIn Organic and Paid Ads, Zoom Webinar

Project Impact: Orchestrated omnichannel campaigns driving \$1.4M revenue and \$6.4M pipeline in 7 months, with standout achievements including 600 registrants from a single email (300x event goal) and \$500K from two low-cost virtual event campaigns.

CHALLENGE: As the Head of Demand Generation, I faced the formidable challenge of surpassing our company's lead generation and revenue targets. In response, I orchestrated a comprehensive strategy aimed at elevating our marketing efforts to unprecedented levels of success.

APPROACH: To address this challenge, I devised a multifaceted approach that combined broad-reaching demand generation campaigns with targeted Account-Based Marketing (ABM) initiatives. This involved leveraging precision targeting techniques to engage key accounts and foster deeper connections with our audience.

STRATEGY: One of our most remarkable achievements was a meticulously crafted email campaign that garnered an astounding 600 registrants, surpassing our expectations by 300-fold for the Revenue Strategy Forum event. Simultaneously, our ABM strategies secured 30 webinar attendees from our targeted list within just one week, showcasing the effectiveness of our precision targeting efforts.

RESULTS: Under my leadership, these initiatives generated significant outcomes, with two event campaigns alone contributing \$90K in closed revenue and \$375K in qualified pipeline, culminating in a total revenue of \$1.4 million and a \$6.4 million qualified pipeline within seven months. Additionally, amidst the challenges posed by the pandemic, I prioritized maintaining strong relationships and morale. I introduced virtual events through Postal.IO and utilized the Sendoso gifting platform to distribute branded swag boxes, resulting in \$250K in sales for just one salesperson upon implementation.

EXECUTIVE LEADERSHIP: These accomplishments underscore my capacity to innovate and execute marketing strategies that exceed expectations, demonstrating expertise in digital marketing tools and the importance of fostering meaningful connections with our audience.

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9-12 March 2021
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 Fill out the form to schedule a meeting with us!

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 Email* Phone number
 Position Level* Job Function*
 Company Name*
 Country/Region*
 Subscribe to Marketing Communications
 UTM Campaign
 UTM Content
 Register

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Duetto Pulse Report

The latest regional bookings and web traffic data

Hi Friend,

As a service to hoteliers, the Duetto team is excited to share anonymous hotel bookings data from our customers around the world.

With the [Duetto Pulse Report](#), you will:

- Understand where the signs of positivity are within the hotel industry
- Learn where real booking data is suggesting that June and July 2021 could actually outperform June and July 2019 (yes, pre-Covid!)
- See web traffic reports

Click [here](#) to explore the latest data as well as video insights to help you anticipate and plan for recovery.

[View the Pulse Report](#)

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Break free from traditional and limiting pricing strategies. Discover an innovative way to maximize your hotel revenue profitability. Download Now.

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First Name* Last Name*
 Email* Phone number
 Position Level* Job Function*
 Company Name*
 Country/Region*
 Subscribe to Marketing Communications
 UTM Campaign
 UTM Content
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Join us for Hotel Tech Greek Summit 2021

03 March, 2021
 RevitUp Consultant Nikos Giokas is joined by Hospitality Technology experts from Duetto, SOUL TAILOR (Eurotel Group), and Triparound to discuss hidden revenue streams, technology & wellness, crashing the competition, and how a revenue strategy platform can help you adapt.
 Register Today and Join the Conversation!

Host

Nikos Giokas
 Business Development Manager

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Weber & Zoom with Duetto

Join us for a special evening
 We would like to invite you and your family or partner to Weber & Zoom with Duetto!

Join us on March 11 at 7pm CET / 6pm GMT
 Duetto is teaming up with Weber for some live grilling! Join us for the first ever Weber & Zoom, as part of an exclusive group while we participate in learning grill techniques from the experts at Weber Grills.

Confirmed guests for this event will each receive your choice of main dish for two, which will be shipped by our partner.

Please RSVP by March 4, and provide the address where you would like the food shipped. We will not use your address for any other purpose.
 We look forward to spending time with you and can't wait to see your BBQ skills.

First name Last name
 Email
 Company name
 Main Dish
 Please Select
 I will be cooking on my...
 Please Select
 Please share your shipping information
 Street address

Let's Talk Revenue

Join us for a Bavarian Breakfast featuring: Gorgeous Smiling Hotels
 21 April, 2021 | 11 am CET

[Register Now](#)

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Meet with me at ALIS

July 26-28, 2021 | Los Angeles, CA

John Lingos-Webb
 Sr. Director of Global Partnerships & Alliances, Duetto

Connect with Duetto at the ALIS Conference!

We're looking forward to seeing you in person again at The Americas Lodging Investment Summit July 26-28, 2021 in Los Angeles, CA.

[Book a Meeting](#) with John Lingos-Webb, Senior Director of Global Partnerships & Alliances at Duetto

to discuss:

- management systems and revenue strategy
- ing your current technology stack
- miting revenue strategy for the new normal
- ng operational efficiencies and maximizing profits

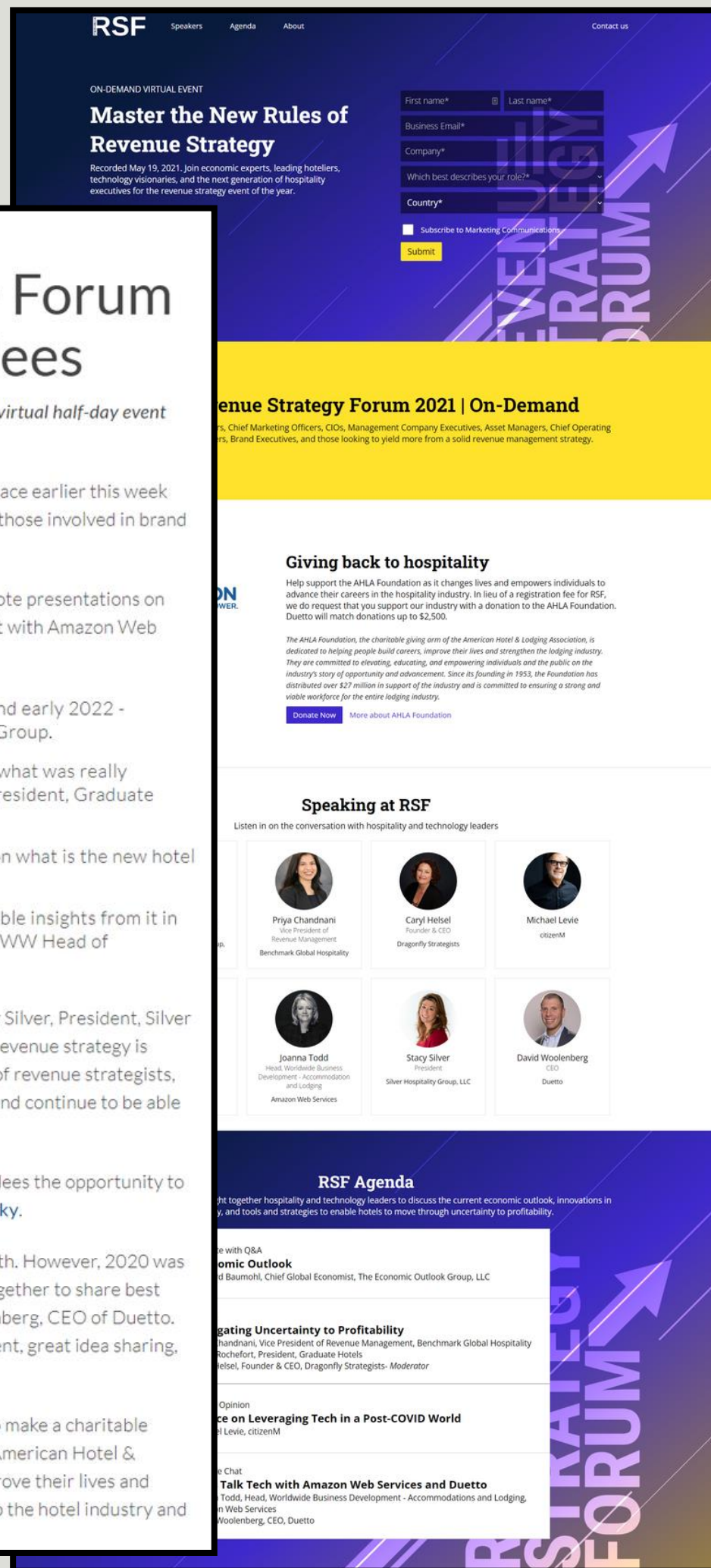
[Book a Meeting Today](#)

LEAD GENERATION RESULTS

\$1.4M attributable revenue

\$6.4M qualified pipeline

48% conversion rates



Virtual Revenue Strategy Forum Attracts over 900 Attendees

Economic experts, leading hoteliers & technology visionaries came together for virtual half-day event focused on 'Mastering the New Rules of Revenue Strategy'

San Francisco, May 20, 2021 – The virtual Revenue Strategy Forum took place earlier this week and brought together technology and hospitality industry leaders, including those involved in brand operations, revenue management, marketing, sales, and distribution.

The virtual half-day conference combined panel discussions along with keynote presentations on our economic outlook, technology in a post-COVID world, and a fireside chat with Amazon Web Services. Some key takeaways included:

- There will be more spending on services, including travel, in 2021 and early 2022 - Bernard Baumohl, Chief Global Economist, The Economic Outlook Group.
- Revenue management technology key to a better understanding of what was really happening and helped revenue teams to adapt - David Rochefort, President, Graduate Hotels
- Hotels need to access their own business intelligence and zoom in on what is the new hotel use – Michael Levie from citizenM
- Hotels that cannot access their data in one place and create actionable insights from it in real-time will be at a huge competitive disadvantage - Joanna Todd, WW Head of Accommodations and Lodging, Amazon Web Services

"It is gratifying to see the return of RSF even in the virtual format," said Stacy Silver, President, Silver Hospitality Group. "The hoteliers who joined us understand how important revenue strategy is needed in our industry. There are few events like RSF focused on the needs of revenue strategists, who have to understand emerging technologies, current market conditions and continue to be able to drive profit contribution and improve asset value."

The event wrapped up with an interactive After Party, which provided attendees the opportunity to virtually mingle, chat and enjoy great music, hosted by upselling platform Oaky.

"RSF is an annual event that Duetto has been very proud to be associated with. However, 2020 was the first time in five years that we were unable to bring the hotel industry together to share best practices and find new solutions to combined challenges," said David Woolenberg, CEO of Duetto. "This week's virtual RSF had all the hallmarks of previous events: great content, great idea sharing, and a great After Party!"

In lieu of a registration fee for RSF North America, attendees were invited to make a charitable donation to support the AHLA Foundation, the charitable giving arm of the American Hotel & Lodging Association, which is dedicated to helping people build careers, improve their lives and strengthen the lodging industry. The grand total of \$3,000 was raised to help the hotel industry and its front-line workers.

EVENT MANAGEMENT RESULTS FOR A SINGLE VIRTUAL EVENT

2X targeted registrants

\$100K revenue

\$400K qualified pipeline

Hi Friend,

I'd like to invite you to join me, along with leaders from Amazon Web Services, CitizenM, Graduate Hotels, and Benchmark Global Hospitality, for the "Revenue Strategy Forum 2021," on May 19, a virtual meeting place for industry leaders and revenue professionals.

This 2 1/2 hour event includes:

- Keynote with Q&A on the economic outlook of our industry
- Panel discussion on turning your uncertainty into profitability
- Advice on leveraging technology in this post-covid world
- A special fireside chat with Amazon and Duetto

To name a few.....

[Click here to register - and I hope to see you there.](#)

David Woolenberg
Chief Executive Officer
Duetto

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\$1.1M ABM PROGRAM MANAGEMENT

Company: Duetto

Date: 2021

Project Type: Marketing and Advertising Campaigns

Project Activity: Account-Based Marketing (ABM), Program Management

Technical Expertise: DemandBase, Sendoso, Postal.IO, Zoom Webinar, ZoomInfo

Project Impact: Led ABM initiatives, resulting in \$1.1M through strategic management, sales training and BDR programs, with standout achievements including securing 30 high-target webinar attendees and implementing a Sendoso program generating \$250K opportunities, while expanding target accounts and improving sales tracking.

CHALLENGE: In my role overseeing Account-Based Marketing (ABM), I encountered the challenge of driving substantial results while effectively managing program direction and budget allocation.

APPROACH: To address this challenge, I adopted a proactive approach, focusing on the strategic development and execution of ABM programs. I recognized the need for scalability and integration of outsourced resources to augment our efforts.

STRATEGY: To support these endeavors, I expanded our target account list by incorporating additional regions and tiers, enriching our database with crucial contacts through collaboration with a data research agency. Furthermore, the development of comprehensive sales dashboards facilitated effective tracking and reporting, enabling informed decision-making and agile strategy adjustments.

RESULTS: My direct involvement in crafting and implementing ABM initiatives led to tangible outcomes, including \$140k in revenue and \$875k in qualified pipeline. Additionally, I spearheaded the integration of an outsourced Business Development Representative (BDR) program, generating an extra \$350k in opportunities and \$50k in revenue. Moreover, the swift success of a Sendoso gifting program, yielding \$250k in opportunities within three months, underscored the effectiveness of personalized engagement strategies.

EXECUTIVE LEADERSHIP: My tenure in this role exemplified a blend of strategic oversight and hands-on implementation, driving significant revenue and pipeline growth through ABM initiatives. These achievements demonstrate my capacity to manage complex programs from inception to execution, leveraging external partnerships and innovative technologies to surpass program goals.

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Duetto Presents
Spotlight Series:
Real Talk with Hospitality Executives

Featuring Jenna Villalobos, VP of Commercial Strategy at Outrigger Hospitality Group

Jenna and Gary Glodowski, Director of Customer Success at Duetto, talk about the importance of tech and which segments look set to return to Hawaii first.

Watch now On-Demand!

First Name* [input]
Business Email* [input]
Company* [input]
Which best describes your role? [dropdown]
Country* [dropdown]
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Duetto Spotlight Series: Real Talk with Hospitality Executives

As hotels are starting to see the end of the tunnel, we are excited to welcome you to the Duetto Spotlight series - inter hotel executives to discuss strategies, best practices, and to have a look behind the curtains during the past few months.

Get more done and realize more revenue faster
Advanced analytics, accurate forecasting, and real-time reporting on the only system built to allow Open Prio

duetto PRESENTS
SPOTLIGHT SERIES

CEO Spotlight: Heiko Grote, Gorgeous Smiling Hotels
May 11, 2021 | Sarah McCay Tams, Director of Marketing Communications.

On April 28, 2021, Duetto's Vice President of Sales for EMEA, Michael Schiffrer, shared a Bavarian Weisswurst breakfast with Heiko Grote, CEO of **Gorgeous Smiling Hotels**, as they talked about navigating through Covid, in the first in our CEO Spotlight interview series.

The conversation was conducted in German. Catch the highlights below or watch the videos in German with English subtitles here.

First of all, where does the name come from? At Duetto, 'Gorgeous Smiling Hotels' is one of our most favorite hotel company names.

Ultimately it was my father. This is a family-owned business that my father founded in the 1960s. I took over management in 1997 and expanded the portfolio. The 'G' stands for 'Grote', of course, but at some point, we said to ourselves: 'No, that can't work. It doesn't necessarily have to be that the name is reflected in the company.' And then, in 2010, our marketing department came up with the idea. What are we here for? We try to put a smile on our guests' faces and that's why we came up with 'Gorgeous Smiling Hotels'.

Looking back on the past 14 months, tell us about how you reacted to the pandemic. Now you have 50 hotels, with a few thousand employees. How did you manage this?

I already had a bad feeling in February 2020. I saw that the booking behavior had changed a bit. We no longer had the amount of bookings that we had in February in previous years. And then in March, everything became apparent, and I have to pay a big compliment to our Head of Personnel and our personnel department and also to the efforts of all the staff in the hotels, that we realized relatively quickly, okay, we have to reduce from 100 to 0 immediately and put a stop to it. By mid-March, we had the minimum number of staff in the administration, so that in the end we could only work on a daily basis, but all the others were on short-time labor. And also many thanks to the employees, who all complied and said: 'Yes, we'll go along with it, we understand.'

How do you make such a big decision, to go from 100 to 0?

It was a team decision. I didn't decide alone. We decided to consistently close all the hotels and then wait and see what happens. So it was a pure team decision here in Domagkstraße, at our head office. We said back then: 'We'd rather pull the plug sooner than have it pulled by a third party. And I think that was the right decision.'

How did you, yourself, keep a clear and cool head?

April and May last year we were actually all more relaxed. We said: 'Okay, now we'll take this as a time-out. We benefit from the tax breaks, from the insurance policies, etc.' We used April and May for ourselves, personally, to simply slow down again. The weather was actually quite good. Everything was fine.

June, July, and August were positive as well. Everything was excellent. September was also good. I would say that the big depression, also for me personally, came in mid-October and November. The weather was bad and we saw that the second lockdown would hit us harder. And that was truly the case.

I also had bad days and that's why it was always good that we tried not to do this pure home office work, but to always work together here in a small team, because then you can also support each other. That was good for me because Monday was always the biggest disaster for me.

It was really a small team here that supported each other every day and said: 'Come on, we can do it. We will really come out of this crisis in the way we imagine. That was very, very good.'

Before Covid, what were your plans for 2020 and beyond? You were already looking to adopt Duetto. What else was on the horizon?

Our plans haven't really changed a lot. In 2020, of course, we opened many hotels that were in the planning and implementation stage. Of course, in January 2020 we had a different forecast for the hotels. That's the way it is.

We have just opened up a new hotel in Kiel in 2021. We will open in Rostock in the next four weeks. So that's what we're trying to do. We know that we have to work with a different priority right now - the forecasts we once had have all been shot to pieces. That's pretty clear.

We've talked about revenue and overheads, such as staffing costs, but what about real estate? How did you manage your relationship with landlords and investors during this time?

We actually sought talks with our landlords, which at the beginning - I have to say - were sometimes very

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Re-Embracing the Unknown:
Hotel Revenue Strategy and the Return of Demand
Join us as we look ahead to clearly identify the three stages of the return of travel.

Preparing For the Return of Demand
September 21, 2021 | Sarah McCay Tams, Director of Marketing Communications.

How are you adapting your revenue strategy for the return of demand? How can you embrace the unknown that lies ahead? And how could technology and automation help you to drive efficiencies and improve pricing decisions? These and many more hot topics were up for discussion in our recent webinar, **Re-embracing the Unknown: Hotel Revenue Strategy and the Return of Demand**.

Todd Rollin, Director of Marketing, and Gary Glodowski, Director of Customer Success, took the audience through key tactics hoteliers can employ right now to shore up their revenue today and for tomorrow.

[Watch the webinar On Demand here]

Focusing on segmentation, forecasting, pricing, and automation, Todd and Gary provided some real use-cases for what hoteliers are doing in different markets to maintain and exceed market share.

Gary took the audience through how US-brand The Standard adapted its revenue strategy in 2020 and 2021 at its properties in New York City and London.

Read more on [The Standard New York](#) and [The Standard London](#).

Segmentation

A new example of re-segmentation observed by Gary was building out a new segment that was specifically geared towards tracking COVID-related promotions so that when hotels look back and are budgeting a year from now, they can decide what data is relevant going forward.

Todd talked about looking at different room types and rethinking those mixes. 'Maybe we're shifting from looking at a regular business segment to a different type of group or long-term segment; maybe you're looking to extend the length of stay so that you can shift the number of people you have working at a given time and you're getting longer stays, and you can focus on housekeeping and other areas where you're concerned you may not have enough staff. It's rethinking the mix and your pricing needs,' he said.

They also discussed building segmentation into reporting. Gary advised teams working on multiple properties to clean up segments to be able to unlock benefits when it comes to multi-property reporting.

'Doing this, teams can take less time putting reports together for different brands, different locations, and build efficiencies,' he said.

Forecasting

With hotels opening and closing due to COVID, data became difficult to rely on in terms of being able to forecast.

According to Gary, 'At Duetto, we realized hotels couldn't rely on Same Time Last Year (STLY) data to power forecasts. We had to rethink forecasting. The result was our short-term forecasting rules, which became quickly available to all hotels running on Duetto.'

'It helps revenue teams predict what's going to happen, especially within the 30-day booking window. That's really where a lot of markets saw their booking window shrink to. At the end of the day, it's just about giving you an accurate forecast, which allows you to then price to achieve that,' Gary said.

He talked through the Forecast and Budget builder in Duetto, which provides revenue managers with the ability to build different scenarios, have ad hoc comparisons, and schedule those to come to their email or their stakeholders. This was one of the tools adopted by The Standard.

'For The Standard, it really allowed them to spend less time in the weeds from a data standpoint and find ways to build efficiencies in the process, and ultimately provide what their stakeholders were looking for in terms of forecasting and reporting,' Gary explained.

Pricing Rules

Room type pricing has been reimaged for most of our clients and hoteliers that I talk to in the industry. Where you're looking at different competitive sets, you're rethinking your differentials between your

ABM Training: Sales Playbooks + Sendoso

June 7, 2021

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STRATEGIC ABM PROGRAM MANAGEMENT RESULTS

\$400K
Immediate BDR Program Results

\$250K
Immediate Sendoso Results

\$1.1M
Immediate Program Impact

Duetto on-demand webinar
Re-embracing the Unknown: Hotel Revenue Strategy and the Return of Demand

Watch our hospitality industry experts Todd Rollin and Gary Glodowski talk about the essential steps you need to take to prepare for the return of demand and minimize your margin for error.

In this 30 minute webinar you'll learn how to:

- Stop selling out too soon
- Fix your segments & save your profits & loyalty
- Stop leaving money at the table

Complete the form to view our on-demand webinar today!

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Which best describes your role?* [dropdown]
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★★★★★
398 REVIEWS
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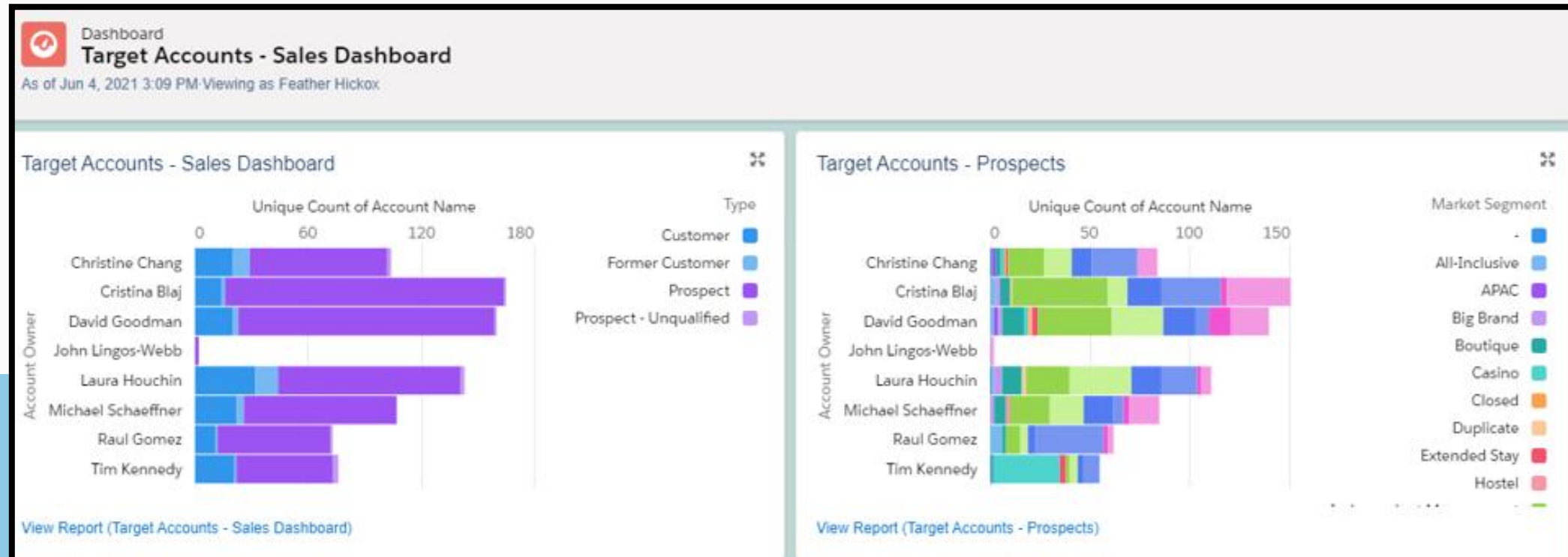
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SPOTLIGHT SERIES
Real Talk with a Hospitality Executive

Heiko Grote
CEO
gsh

28 April,
Register!

duetto PRESENTS
SPOTLIGHT SERIES

TARGET ACCOUNTS DASHBOARD



TARGET ACCOUNT CONTACTS FOUND (STARTED AT 0)



TARGET AUDIENCE DEVELOPMENT

- Acquired 446 target accounts worth \$44M in annual recurring revenue from prospects outside of company databases and customers within company databases.
- Verified 7,200 hotel managers (end-users) and executive contacts within 446 target accounts utilizing third-party resources (OnTarget, ZoomInfo).
- Created BDR Outreach program for target account outreach and trained sales teams on ABM program tools and use cases.

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CEO OUTREACH PROGRAM

Company: Duetto

Date: 2021

Project Type: Executive Leadership Team

Project Activity: Account-Based Marketing (ABM), Program Management

Technical Expertise: Salesforce CRM, LinkedIn Sales Navigator

Project Impact: Orchestrated a CEO outreach program achieving a 48% conversion rate by connecting CEO with target company executives via LinkedIn Sales Navigator, strengthening strategic business relationships.

CEO Outreach Vision

Identify, engage, and build relationships with CEOs at target accounts, with the ultimate goal of securing discovery meetings and winning business.

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CEO Account Research

- Goal for that account - could be a) discovery meeting b) move along a stuck Oppty, c) get customer or partner intro, d) upsell within account, etc.
- Triggers - what matters to them
- Roadblocks
- Personal research - do we know the CEO alma mater, favorite sports, causes close to their heart, last discussion points, connections in common, etc.

Next Steps

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CEO Outreach - Send 2

List development/account research (CEO, COO, CRO, CCO)

- There are 105 management companies + 154 independents - we can split them into 3 sends each and start by sharing the Pulse report with them, and follow-up with the Open Pricing Paper or the joint HTR buyer's guide.
 - North America, Tier 2-3: [SF List](#) > [SN List](#)
 - EMEA, Tier 2-3: [SF List](#) > [SN List](#)
- There are 31 target accounts in the 10k+ room count tier - these are the highest value accounts, so we should offer them a VIP event invitation which we don't quite have ready as Sandra and I are getting started in talks about this. We can make this a priority if needed.
- There are 38 target accounts in the casino segment - we have the resorts and casinos special report you can send them.
- LinkedIn open door options:
 - 8 changed jobs recently - we should create a standard for you to reach out to all new C-level execs at target accounts.
 - 12 leads follow Duetto on LinkedIn - we could do a Sendoso gift to them as a thank you for being part of Duetto and invite them to a VIP event.
 - 73 are connected to someone at Duetto - we could ask the connected contact to add a note about their relationship with them and do a more personal touch.

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Pulse Report

Hi CEO,

As a fellow CEO in the hotel industry, I thought you'd be interested in the latest Pulse Report <link> which highlights some of the positive recovery signs we are seeing for the future of hoteliers everywhere.

I'm excited to share it with you because <something in the data related them specifically>.

Please take a look and I would be happy to connect if you're interested in a conversation about the data as it pertains to the future of XXX.

Sincerely,

CEO Signature

[View the Report →](#)

[Book a Meeting with Me -->](#)

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Create a CEO Guide or Executive Brief

Hi CEO,

As a CEO today, you need to deliver XXX. With a revenue strategy platform like Duetto, you can capture dynamic demand, increase operational efficiency, and be more agile.

The CEO Guide to Duetto is our new ebook designed specifically for CEOs. It's concise, to-the-point, instantly actionable, and it will show you how to pull the levers available with Duetto to help build value for your business.

- Key point bulleted list
- Key point bulleted list
- Key point bulleted list

Duetto is where you can automate and grow your business, even during times of economic upheaval. Download the CEO Guide to Duetto and get started today.

[CTA -->](#)

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Personal Invitation to an Event

Dear CEO,

I would like to personally invite you to XXX hosted by Duetto on XXX featuring thought leaders in the hotel revenue management industry.

Join us to learn best practices and hear from over XXX thought leaders on the next era of hotel revenue management.

RSVP today <link> to reserve your spot.

Sincerely,

CEO Signature

[RSVP HERE -->](#)

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Create a CEO Event

Hi CEO,

Sorry to message you out of the blue like this, but I was hoping to connect with you and see if you would be interested in joining our hotel industry dinner event this month.

Given your background, I thought you would be a great addition to the group. I'm hoping to bring together senior revenue management leaders to enjoy a meal together and have a chance to discuss the changes we're seeing in the hotel industry.

We'll be meeting over Zoom during one of these times, depending on availability:

- Date 1
- Date 2
- Date 3

Please RSVP for the date that works for you. I'm looking forward to you joining us.

[RSVP HERE -->](#)

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- Developed and executed a CEO outreach program targeting executives from key organizations on our target list, leveraging LinkedIn Sales Navigator for precise engagement.
- Collaborated closely with our CEO to craft tailored outreach messages, demonstrating a deep understanding of each organization's challenges and opportunities.
- Achieved a remarkable conversion rate of 48%, showcasing the effectiveness of executive-level engagement in fostering meaningful business dialogues and driving strategic goals.

HubSpot TECHNICAL CONSULTANT & Jira SCRUM MASTER = PERFECT RATINGS

Company: Pierce Systems

Date: 2019-2020

Project Type: Client Services, Account Management, Technical SME

Project Activity: HubSpot Consultant, Scrum Master, Team Leader

Technical Expertise: HubSpot, Salesforce CRM, Jira, Trello, WordStream, PowerPoint, Excel

Project Impact: Successfully onboarded numerous clients onto HubSpot, achieving impeccable satisfaction ratings. Produced video content and case studies for a non-profit, developed target personas for an online pharmacy, authored ebooks for a wealth management firm, crafted lead nurtures and performance reports for a travel agency, and managed SEO and paid search for a toy company. Additionally, became a Scrum Master on Jira.

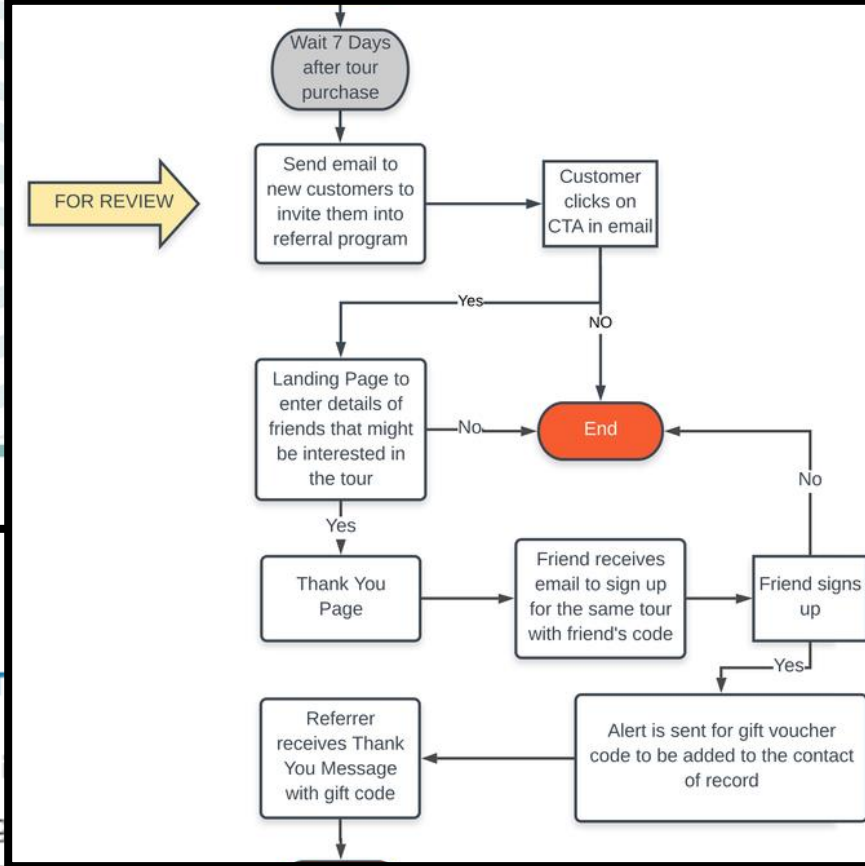
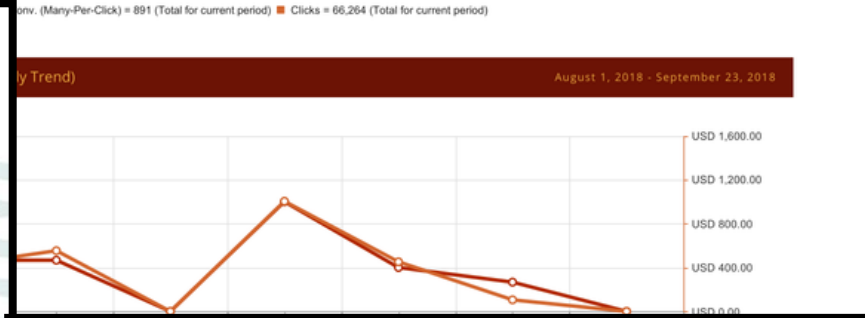
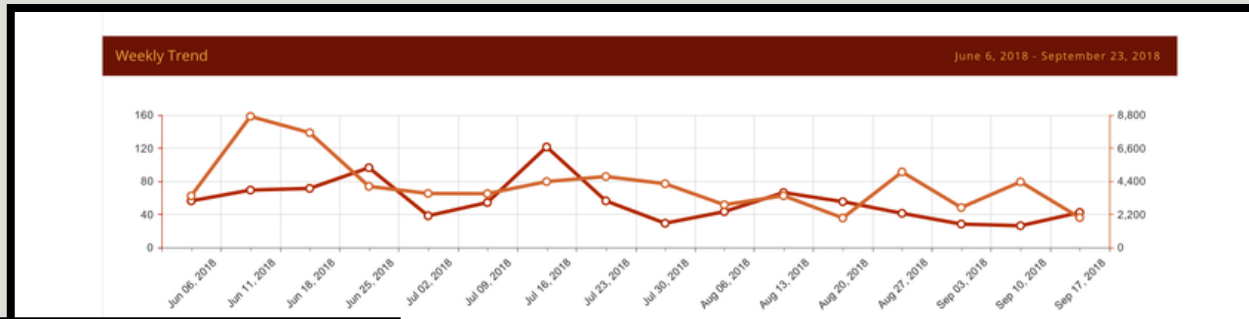
CHALLENGE: Transition numerous companies across various industries from their current marketing automation platform to HubSpot while seamlessly integrating their systems with no downtime, all while providing guidance on the platform and their marketing processes. Additionally, manage, launch, and report ongoing campaigns concurrently.

APPROACH: One of the key aspects of my role was managing technical implementations for our clients. This involved holding regular training sessions to ensure they were proficient in using HubSpot, resolving any technical challenges they faced, and tailoring the system to their specific needs. I frequently tackled issues such as field mapping challenges, dashboard setup, and customizing lead nurture workflows. Each client presented unique challenges, and I thrived on finding creative solutions to meet their requirements effectively.

STRATEGY: Outside of my core responsibilities, I took on diverse projects that showcased my versatility and creativity. For a non-profit organization, I spearheaded video shoots and produced compelling case studies to highlight their impact. Additionally, I contributed to various industries, crafting target personas for an online pharmacy, creating informative ebooks for a wealth management firm, and developing lead nurture strategies and performance reports for a travel agency.

EXECUTIVE LEADERSHIP: Furthermore, I managed SEO and paid search campaigns for a toy company, leveraging my digital marketing skills to drive visibility and engagement. Additionally, I became a Scrum Master on Jira and led client teams during their transition to the project management platform. This diverse range of experiences has honed my ability to adapt to different industries and client needs while delivering exceptional results.

RESULTS: I excelled in onboarding clients onto HubSpot, ensuring seamless transitions and earning consistently high satisfaction ratings. My dedication to client success led me to conduct strategic marketing process reviews, resulting in enhanced efficiency and effectiveness. Through close collaboration with HubSpot, I earned additional certifications, further solidifying my expertise in the platform.



Checklist Items	Narrative
Migration	
Consulting on what data to migrate to HubSpot	In this phase, most of the conversation is structured around understanding a company's current data model and how it will be translated to HubSpot. It is also important to understand the timing they expect to roll out the Sales Hub to the sales organization in order to work backwards to understand when each step should be completed by. At this point, it is unlikely the sales team will be using the Sales Hub unless they are in a SDR role and can leverage some of the sales engagement tools like
Migrating Custom Object to Standard HS Objects	
Specific timing requirements (>30 Days to Implement)	
Customer wants someone to do the migration for them	
Migrating Parent/Child Relationships	
Importing Large Databases	
Importing Engagements	
Gathering data from previous CRM to be migrated	
Importing data with associations	
CRM Implementation	
In-depth consulting and creation of a new sales process	In this phase, the necessary data has been moved over to HubSpot and now the task becomes how to set up a means by which a sales team can access that data. Key conversations in this phase center around the current sales process and what should be replicated in HubSpot vs. what can be improved. At the least during this phase, an admin and/or sales manager are using the Sales Hub to ensure they understand it and are able to get the reporting they need.
Process is very different than how CRM is set up today	
Consultation on mapping existing sales process over to HubSpot	
-- Deal Stages	
-- Custom Fields	
-- Filters	
-- Lead Assignment	
-- Lead Status	
-- Users, Teams and Permissions	
-- Default Fields	
Actually implementing that sales process in HubSpot (e.g. doing all of the above for the client)	
Consulting on integrations with existing systems	
Actually integrating existing systems	
-- ERP Systems	
-- Custom Integrations	
-- SSO	
Sales Enablement + Automation	
In-depth consulting on how reps spend their day (process map, etc.)	In this phase, the reps are introduced to the Sales Hub, usually in through a small pilot. A key exercise here is to understand what the average day for a sales rep looks like and to suggest improvements in efficiency based on what the HubSpot platform can do. Key sales content and collateral are also being created inside of the Sales Hub during this phase.
Consulting on how to use the sales acceleration tools	
Automating core rep and process tasks using Workflows	
Creation of Playbooks for Sales Team	
Creation of Sales Content for Sales Team	
Outsourced Sales Development	
Sales + Marketing Alignment	
Consultation on sales + marketing alignment	In this phase, the (at least pilot group) of reps are familiarizing themselves with the Sales Hub, and now a consultant can turn their attention to a key moment of delight for their clients - sales and marketing alignment. The key activity in this phase is to bring in a sales and marketing stakeholder to understand how the marketing to sales handoff works and if there are agreed upon SLAs around number of handoffs and quality of those handoffs.
-- Help installing the tracking code	
-- Combining web forms with Sales Hub	
-- Consulting on personas	
-- Define Lifecycle stages	
-- Define lead scoring rules	
-- Define MQL SLAs	
-- Create closed lost nurturing	
-- Combining Meetings with website and marketing email	

ARJUNA
Behavioral Economics and Artificial Intelligence Individual Fundraising

HOW TO IDENTIFY YOUR FINANCIAL GOALS

HUBSPOT CLIENT SATISFACTION RESULTS

100% satisfied clients

6 different industries

9 unique challenges



Dr. Dan
Primary Care Physician

ABOUT
Dr. Dan
patient g
hundreds of patients - as efficient
primary care out of a desire to ser
out of the Charlotte area for the la
Dan wants to offer options that w
are to increasing medical costs, h
more sensitive conditions like erec
direct marketing to keep up to dat
solutions that are easy to explain,
coordinating with external parties

GOALS



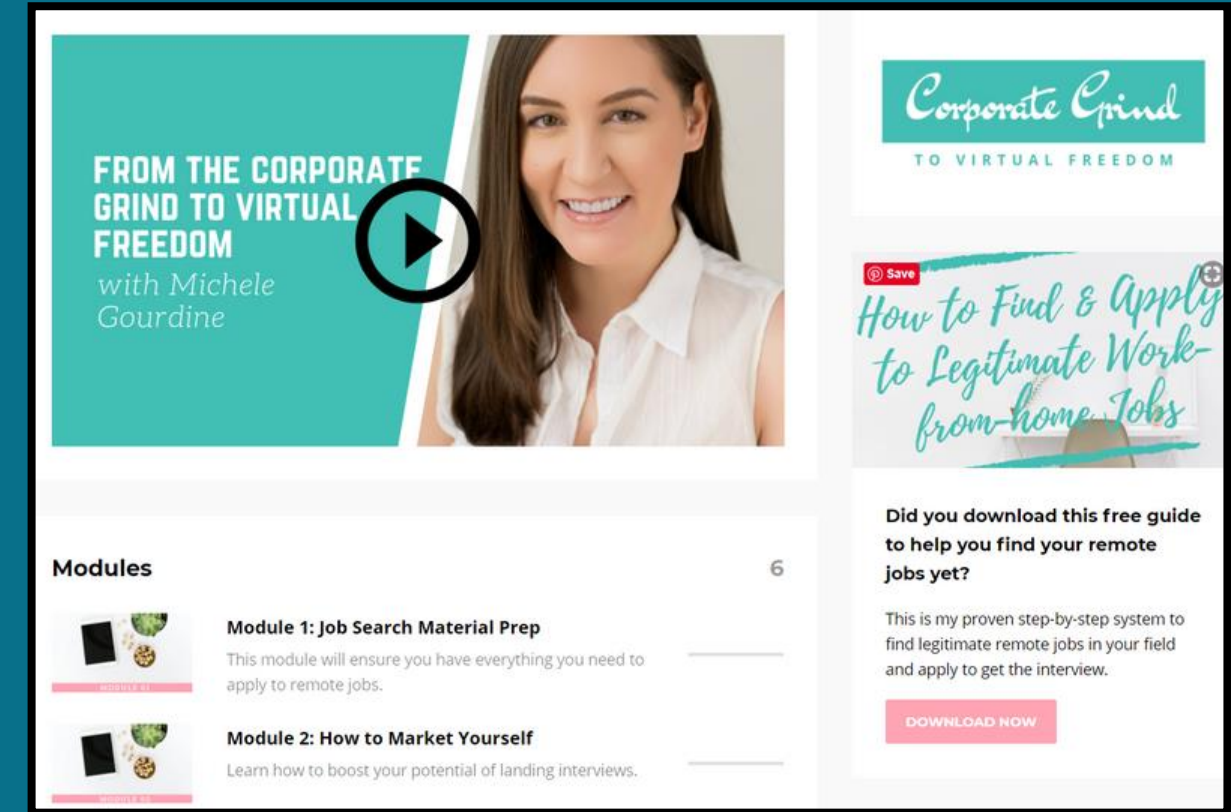
CHALLENGE: During my academic tenure at Pepperdine University, I encountered the challenge of developing a specialized career counseling course tailored for remote professionals, aiming to address their unique needs and aspirations.

APPROACH: Grounded in adult learning theories and utilizing the ADDIE training model, I meticulously crafted a comprehensive program, ensuring alignment with the specific challenges and preferences of remote professionals through thorough research and anonymous surveys.

STRATEGY: Employing project management tools such as Trello and Excel, I strategically mapped out course objectives and content modules, fostering engagement through a blend of asynchronous and synchronous learning materials hosted on the Kajabi LMS platform. Despite initial success, I addressed lower-than-expected completion rates by soliciting comprehensive feedback from students and introducing orientation materials for additional support and guidance.

EXECUTIVE LEADERSHIP: Additionally, I created content for lead funnels, including YouTube series, blog posts, social media posts, and ebooks to bring new students into a webinar, which I also led, to introduce them to the course and capture new students into the program.

RESULTS: This initiative led to a remarkable increase in completion rates, showcasing my commitment to continuous improvement and student success. Additionally, in my role as lead recruiter for a remote workforce transition program, I leveraged social media paid ads and engaging weekly vlogs to attract 117 registrants within just 7 days, highlighting my proficiency in blending creative content production with data-driven marketing strategies to achieve



CAREER COUNSELING CONTINUING EDUCATION TEACHER & RECRUITMENT MARKETING

10%
student conversion rate

117
registrants in 7 days

<15% TO >50%
boosted course
completion rate



Client Services Manager - Exceeds Goals by \$1M

Company: DemandGen

Date: 2016-2018

Project Type: Client Services, Account Management, Learning & Development, Teaching, B2C Campaigns

Project Activity: Marketing and Advertising Campaigns, Data Analysis & Reporting, Presenting, Project Management

Technical Expertise: Marketo, Eloqua, Google Forms, WebEx, PowerPoint, Excel, Salesforce CRM, Kapost, LiquidPlanner

Project Impact: Optimized client service through innovative processes, turning a challenging tech client into the most profitable with a 13-month renewal 2x the previous amount; spearheaded global user adoption to 98% for another tech client, clinching a \$300K contract via international training sessions.

Transformed client engagement strategy for 2 industrial clients by introducing detailed analysis and data-driven campaign reporting. Enhanced transparency through weekly utilization and status reports, production audits, and shared task tracking. Improved workflows with a QA process, efficiency and user adoption tracking, and production volume by campaign type. Developed and delivered best practice presentations.

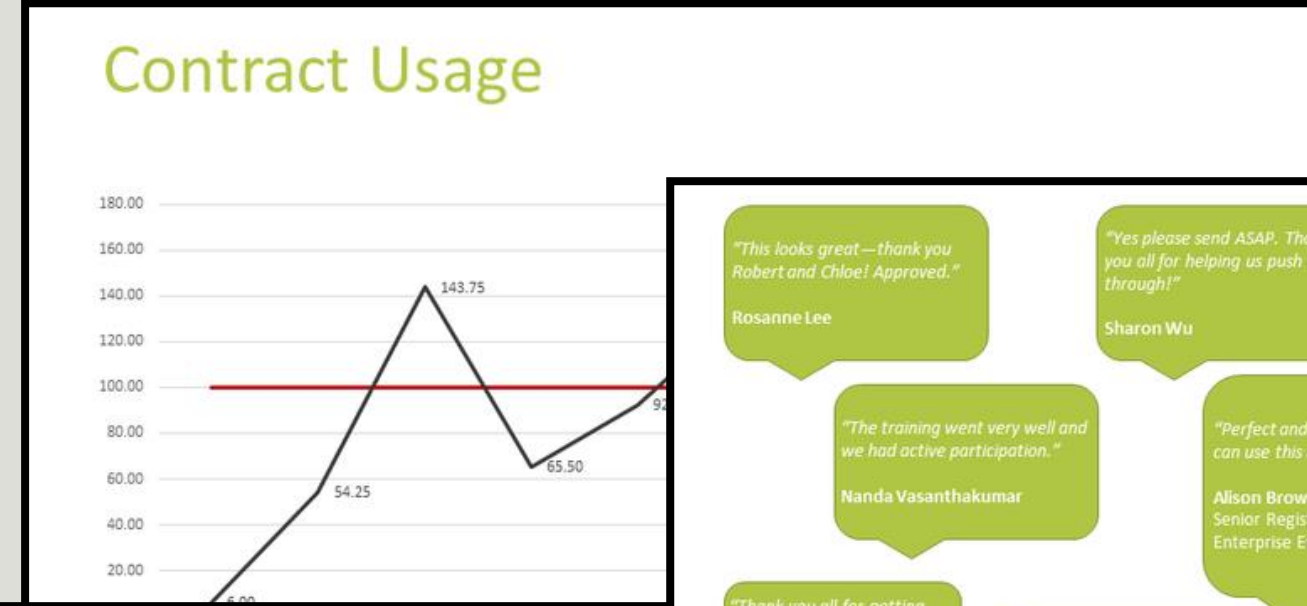
Revitalized nurture programs for 14 targeted segments through strategic campaign analysis and a/b testing, creative and content creation, lead prospecting programs, and technical implementation including dynamic content programs. Provided 75k leads across all target segments which led to an unprecedented client renewal of 1.5 years.

Charlene Wan: "Thank you, Michele, for the report and clarification. Very helpful."

Cameron Chang: "No problem at all, Robert. You did everything exactly as requested. Thank you for all your help."

Nanda Vasanthakumar: "Thanks for all the hard work last few weeks, I know its been crazy but we are getting there."

Gillian McGreevy: "Firstly thank you – because of your help, my call with the EMEA Stakeholders went well today."



Rosanne Lee: "This looks great—thank you Robert and Chloe! Approved."

Sharon Wu: "Yes please send ASAP. Thank you all for helping us push this through!"

Nanda Vasanthakumar: "Looks great and all my changes are there too so we are good."

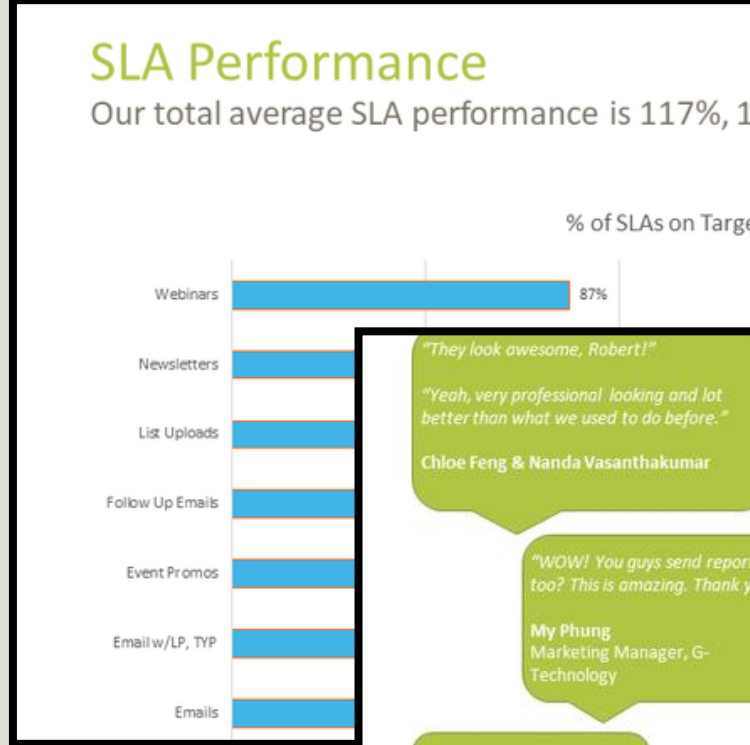
Nanda Vasanthakumar: "The training went very well and we had active participation."

Alison Brown, Senior Registration Manager, Enterprise Events Group: "Perfect and thank you, Robert, We can use this moving forward."

Charlene Wan: "Thank you to ALL!!! I know this is totally out of the ordinary and not within your normal responsibility. But, seriously, all of you are stepping up to help us and WDC in general, to complete this task to be shown as a leader in what we do! Thank you so very much for your support!!!"

Susie Schmitt: "Thank you all for getting this out for me today!"

Chloe Feng: "I really like this summary because I can see the trend also. Thanks Michele!"



Chloe Feng & Nanda Vasanthakumar: "They look awesome, Robert!"

Chloe Feng & Charlene Wan: "Thanks Robert and Michele for turning this around in a day. You guys are the best!"

Charlene Wan: "Wowwowwow, we did it! Thank you SOOOOOOOOOOOO MUCH!!!!!!!!!!!!!!!"

My Phung, Marketing Manager, G-Technology: "WOW! You guys send reporting too? This is amazing. Thank you!"

Anna Ruiz, Corporate Marketing Events Manager: "Fantastic, Chloe. Thank you and your team for the quick turn-around."

Nanda Vasanthakumar: "Thanks for taking care of all the urgent and hurried requests. I think we will get busier as more teams know about our service and the good work this team is doing. Its a good problem to have and we can always ask for more resources I feel."

Chloe Feng: "Thank you Michele. Looks great!"

Rosanne Lee: "Thank you for the report and for all your help with this campaign!"



HubSpot CONSULTANT & CONTENT CREATOR + GHOSTWRITER = SALES GROWTH

Company: MG Consulting

Date: 2014-2016

Project Type: Client Services, Account Management, Marketing and Advertising Campaigns, Technical SME

Project Activity: Lead Generation, HubSpot Consultant, Marketing Strategist, Content Creator, Ghostwriter

Technical Expertise: HubSpot, Salesforce CRM, Asana, Toggl, PowerPoint, Excel

Project Impact: As a HubSpot Consultant, worked with 2 marketing agencies, supporting them and all of their healthcare, technology, B2C, and education clients. Seamlessly transitioned employees to HubSpot with zero downtime, spearheaded a 30-day campaign generating over \$2M in pipeline, expanded a digital agency's client base fourfold, managed a successful migration from Pardot to HubSpot doubling website visits to 60K/month through SEO optimizations. Content creator for 15 HubSpot clients - ghostwrote diverse digital content resulting in significant sales growth for clients, including a client earning 5 sales in 1 day from my campaign.

CHALLENGE: During my tenure as an Organizational Development Consultant, I seized the opportunity to lead transformative projects aimed at enhancing each client's digital presence and performance.

CLIENT 1 APPROACH/STRATEGY: One notable achievement was leading the onboarding of a digital agency and their four clients onto the HubSpot platform. This involved comprehensive training in inbound marketing practices and HubSpot nuances, culminating in a successful 30-day launch campaign that generated over \$2 million in the opportunity pipeline. Additionally, I played a pivotal role in scaling operations, expanding the agency's client base fourfold within just eight months. Furthermore, I led strategic initiatives to boost client web traffic and visibility. By implementing SEO best practices and managing a platform migration from Pardot to HubSpot.

CLIENT 1 RESULTS: I achieved remarkable results, increasing client web traffic from 100 to over 1,000 visits per month and doubling website visits from 30,000 to 60,000 per month, and capturing \$2M in opportunity pipeline. These experiences underscore my ability to drive digital transformations, scale operations effectively, and significantly improve lead generation and web traffic through strategic marketing initiatives.

CLIENT 2 APPROACH/STRATEGY: For another client, I managed content creation and inbound marketing activities for small businesses, producing nine blogs and crafting various content pieces tailored to each of their client's unique voice and objectives. By implementing a weekly interview process with client founders, I ensured authenticity and engagement in every piece of content produced.

CLIENT 2 RESULTS: This approach, coupled with strategic SEO and PPC strategies, led to significant milestones such as achieving five sales in a single day for a client. These experiences highlight my ability to blend content creation with strategic marketing initiatives, driving significant results for our clients and setting new benchmarks for success.

EXECUTIVE LEADERSHIP: These experiences underscore my ability to drive digital

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Process Improvement at the Speed of Business

Wednesday, November 18 @ 10:00 am CST

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is fast enough to keep up with market competition from competitors and start-ups. This can drive revenue



VA Clinical Practice Recommendation for Power Assist Wheelchairs

Posted by Andy Maas on March 16, 2016 10:26 AM

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7 Ways Workflow Software Changes the Game for Your Organization

Improving Information Movement with Powerful Workflow Tools

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- High costs
- Inefficient processes
- Time-wasting bottlenecks
- Errors
- Accountability issues
- Compliance shortcomings
- Impediments to customer relations



The golden ticket to a lean and powerful workflow? **Workflow management software.**

This guide opens your eyes to the seven ways workflow software and process improvement tools change the game for your organization by improving your:

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- Reducing human error

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HUBSPOT CLIENT SATISFACTION RESULTS

5 SALES
in 1 day!

\$2M
from 1 campaign!

15 BLOGS
as content creator & ghostwriter

Rent™

Org Development Consultant = Sales & Marketing Alignment

Project Type: Marketing and Advertising Campaigns, Human Resources, Recruitment Marketing, Program Management

Date: 2013-2014

Project Activity: Internal Communications, Website Management, Collateral Development, Content Marketing - Technical Writing and Graphic Design, Lead Generation

Technical Expertise: Salesforce Chatter, Content Library, Marketing Cloud. Powerpoint, Adobe, WordPress

Project Impact: Successfully led integration of 300-person sales team and corporate marketing on Salesforce Chatter, achieving 100% adoption, transforming sales satisfaction. Spearheaded creation of collateral, including a Salesforce content library. Collaborated on 'Think Bigger' campaign, doubling engagement and earning sales team's favorite campaign accolade.

Collaborated with the Human Resources team to create 'Think Bigger' recruitment collateral, spurring a corporate rebrand and website overhaul project that I also led, culminating in a highly praised launch by executives within a month.

Architected and refined a B2C email marketing program for RentPath, leading to its evolution as the most profitable offering with consistently high engagement rates and robust lead generation for apartment communities, allowing the sales team to capitalize on it to close more deals.





Rebrand + Trade Show + Website in 3 Months = \$4M Revenue

Project Type: Executive Leadership

Date: 2011-2012

Project Activity: Event Management, Marketing and Advertising Campaigns, Website Management, Content Marketing - Technical Writing and Graphic Design, Branding, Collateral Development

Technical Expertise: MailChimp, Adobe, Accrisoft CMS

Project Impact: Successfully led a company rebranding and coordinated the largest trade show of the year within a 3-month deadline, resulting in \$2.5M in sales from on-site demos and a comprehensive update of all brand assets. Developed and launched a new website on Accrisoft CMS, managing structure, assets, SEO, and promotions, resulting in a 300% increase in traffic.

Revitalized email communication strategies, spearheading a company newsletter and achieving a 23% open rate through advanced segmentation and template optimization. Repurposed materials for C-Suite executives, driving \$1.5M in pipeline closures and bolstering global marketing efforts.





4 YEARS AT NON-PROFIT WORKING ALONGSIDE C- LEVEL EXECUTIVES & GOVERNMENT OFFICIALS

Company: UL Solutions

Date: 2008-2011

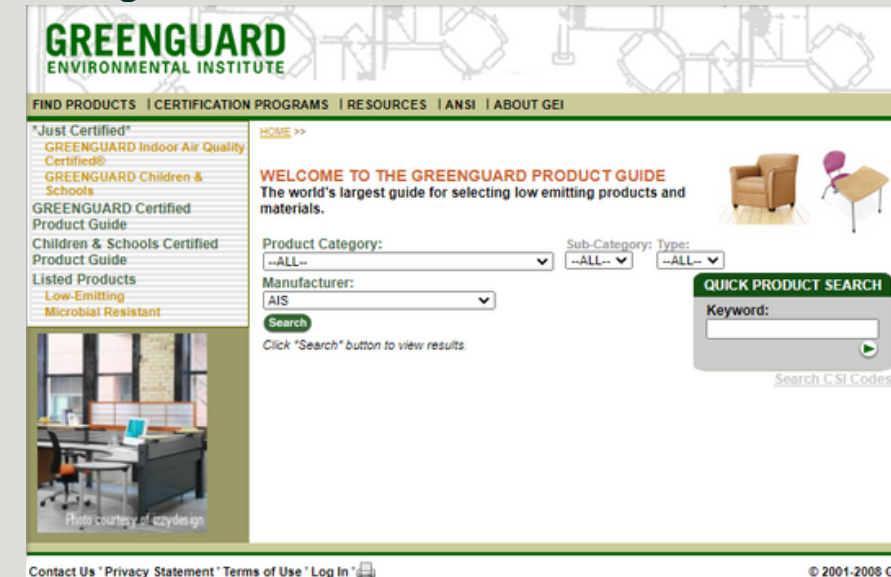
Project Type: Executive Assistant, Human Resources, Event Management

Project Activity: Website Management, Program Management, Project Management, Budget Management, Employee Engagement, Internal Communications, Content Marketing, Team Leadership

Technical Expertise: Microsoft Word, Excel, PowerPoint, SharePoint, ADP, Drupal

Project Impact: Spearheaded transformative initiatives across various departments, driving operational excellence and client satisfaction.

- **WEBSITE MANAGEMENT:** Managed and updated Greenguard.org's product guide, achieving 100% client retention and initiating a strategic shift in prioritizing website listings.



- **PROGRAM MANAGEMENT:** Established and executed the Emissions Testing Lost Funds Program, recovering over \$30k in revenue.
- **PROJECT MANAGEMENT:** Streamlined board book preparation, earning CEO praise for the most seamless process in company history.
- **BUDGET MANAGEMENT:** Saved \$100K on an interior design project through strategic partnerships.
- **EMPLOYEE ENGAGEMENT:** Spearheaded employee retention initiatives, reducing turnover from 6% to 1% within a year.
- **INTERNAL COMMUNICATIONS:** Revolutionized internal communication by implementing SharePoint, enhancing productivity and collaboration.
- **CONTENT MARKETING:** Facilitated Dr. Marilyn Black's emergence as a thought leader in indoor air quality through content editing.



LET'S TALK ABOUT HOW I CAN SUPPORT YOU

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856-404-5234

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