



## Customer

KnowledgeVision is reinventing the online business presentation. Its major products, KVStudio and Knovio, offer an easy way to turn PowerPoint presentations into video- and audio-narrated multimedia experiences for training, marketing, sales, investor relations, and communications.

## Challenge

Increase conversions of new inbound leads, as well as reconnect with prospects who had expressed interest in the past, via more persistent and consistent engagement.

## Conversica Solution

Automated marketing and sales conversion management software integrated directly with Marketo, and indirectly with Salesforce.

## Conversica Virtual Assistant

Caitlyn Kelly

## Conversica Assists: First Two Months

- Caitlyn connects with ~600 new leads/month with an 8% "hot lead" rate
  - Allows BDRs to focus on specific outbound campaigns
  - Remaining leads go back into nurture campaigns or have unsubscribed through Caitlyn
- Caitlyn is well on her way to paying for herself
  - 12 major accounts have reengaged due to Caitlyn contacting old leads
  - 1 major healthcare provider has already moved to Stage 90

## KnowledgeVision reengages with major accounts using Conversica®

Like many organizations today, KnowledgeVision has done such a good job of generating inbound leads that they couldn't muster the resources to benefit from them. "We had a major problem; we were driving so many leads that our BDRs could not get to them all," said Susan Zaney, KnowledgeVision's Vice President of Marketing, "so essentially the BDRs had no choice but to pick and choose to decide who to contact." This was frustrating for everyone involved – for Marketing because every one of those interested leads cost money and was worthy of being qualified, and for Sales because no one wants to leave a deal on the table.

And we're talking about a lot of leads. "I searched through Salesforce.com and discovered that I had thousands of leads that had never been touched by a BDR." She continues, "And that was really a big problem for our company. How to connect with all these people who had demonstrated enough interest to become a Priority 1 lead. I've got a 75,000 record database in Marketo, so on the one hand, over the last four years we've done really well in capturing prospects. But what we're not doing well is converting them to sales."

Susan knew she needed to find a way to be able to contact and have a conversation with every single one of those leads, so she could legitimately determine whether each one was hot or was not. "I don't care whether or not it's a hot lead, I just want to know. I mean even 'no' is good because it means you don't have to make more phone calls to figure out that lead is not interested. 'Yes' is even better of course, but not knowing is just a waste of time and money."

Susan stays on top of new Marketing technologies and was aware that artificial intelligence solutions were making strong inroads. She realized that "if we could let AI handle those first qualifying contacts, then Sales could just call the people who actually want to talk with us and we could make them much more efficient." So she decided to give Conversica® a try.

"It just made boatloads of sense."

*"We love Caitlyn Kelly. She works 24/7, is incredibly persistent, and she learns from her mistakes. That makes for a fabulous 'employee'. I've had prospects thank her for her terrific follow-through. She has been flying through our untouched leads. If you have more leads than sales resources, I'd hire a person just like Caitlyn. She's great."*

*Susan Zaney, Vice President of Marketing, KnowledgeVision*

## The Conversica solution

Susan integrated Conversica with her Marketo instance, which is itself integrated with Salesforce. Her inbound leads first run through Conversica where they are engaged in a two-way human conversation to determine their interest and intent. Conversica seamlessly passes its responses and statuses to Marketo, which then automatically syncs with Salesforce where Susan and Sales keep track.

## Conversica assists

Following the Conversica guidance, Susan named her Conversica automated sales assistant Caitlyn, and assigned Caitlyn to handle all new inbound leads as they arrive to identify those whom Sales should contact. "Caitlyn catches the hot leads and then the BDRs follow up," she says, "making us more efficient and Sales more effective." So efficient, she notes, that she was able to add several new targeted outbound BDR campaigns, because BDRs' time was freed up since now the only people that need to be called are Caitlyn's hot leads.

Caitlyn has also helped Susan reengage old leads who were at one time interested but not yet ready to buy. "The Account Exec talks to a lead and they say, 'nice product, wrong timing.' These people are our best prospects. They've already heard about us, they've already gone through the demo, the whole nine yards." But time would pass, and the lead would be forgotten. Forgotten, that is, until Caitlyn came along. "Caitlyn is now catching any recent interest expressed by these old leads and does what she does best – engage in a conversation to find out if they are interested again or not. We have already unearthed a large opportunity with a prospect who first engaged with us in 2013. Had Caitlyn not followed up with her, it would have remained dormant. I think putting Caitlyn on old leads is going to result in even more spectacular results than the ones she finds in new incoming leads."

And perhaps the pièce de résistance, Conversica is actually helping Susan make strategic Marketing decisions. "We are literally making strategic company decisions based upon Caitlyn's results; decisions we

could not have made before Caitlyn delivered the data." For example, based upon Conversica engagement data, Susan was able to identify a specific target market that was yielding weak results, and could then instead redirect her future programs and spending to markets that the data showed to be converting better.

Needless to say, Susan is convinced. "We love Caitlyn. She works 24/7, is incredibly persistent, and she learns from her mistakes. That makes for a great 'employee'. I've had prospects thank her for her great follow-through. She has been flying through our leads. If you need more sales resources, I'd hire a person just like Caitlyn Kelly. She's great."



## For more information

See for yourself how Conversica is revolutionizing sales conversion management. To learn more call +1 (888) 778 1004, email [sales@conversica.com](mailto:sales@conversica.com) or visit [www.conversica.com](http://www.conversica.com) to set up a product demonstration.

## About Conversica

Conversica is the only provider of lead management software for marketing, inside sales and sales organizations. Presented as a customized online persona, Conversica engages and nurtures leads through natural email exchanges until the lead converts into an opportunity or opts out. Conversica is used by more than 12,000 sales representatives worldwide and has assisted in the creation of more than US\$8 billion in sales revenue.

Founded in 2007, Conversica is a portfolio company of Kennet Partners and Toba Capital, and is headquartered in Foster City, California. To learn more, visit [www.conversica.com](http://www.conversica.com) and follow us on [LinkedIn](#), [Facebook](#), [Google+](#), [YouTube](#), and [@myconversica](#) on [Twitter](#).