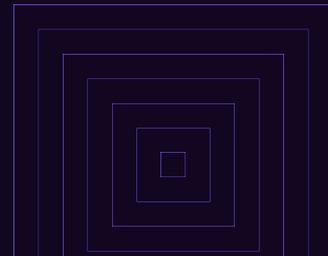
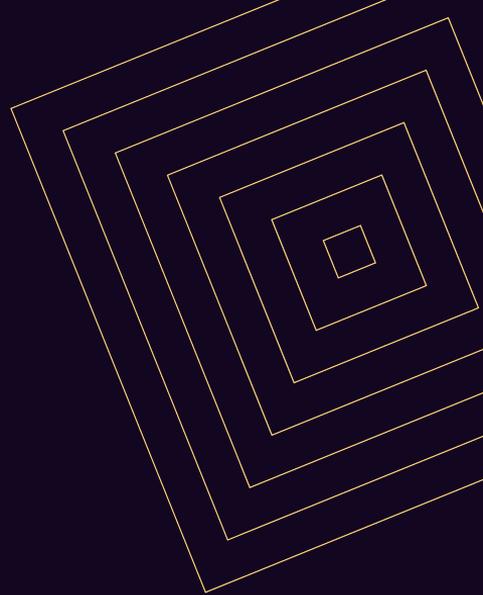


# 6 playbooks to turn the 'Great Resignation' into **pipeline and revenue**

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# Speakers



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# Agenda

- 1 | Great Resignation introduction
- 2 | CRM Data survey results
- 3 | 6 Playbooks
- 4 | Additional Resources
- 5 | Q&A

# The Great Resignation

has elevated data quality problems for marketers

## 1. 4.3 million Americans quit their jobs in August 2021.

The highest resignation rates can be found among mid-career employees.

## 2. Around 64% of workers in the US plan to switch jobs in 2021.

## 3. UserGems data: 20% more job movements in 2021 than 2020 in the first 6 months.

By end of 2021, it'll be higher than what we saw pre-covid and continue into 2022.

# The data housed within CRMs

is amongst the most valuable to any business

**91%**

of respondents rate their CRM system and the data in it as “important” (**47%**) or “very important” (**44%**) for helping their sales team achieve its revenue objectives

**75%**

of respondents agree that data is the lifeblood of their company and a key growth driver

**82%**

use their data to differentiate themselves and gain a competitive advantage

# ...and is essential for building

and maintaining customer relationships

**96%**

of respondents agree that accurate CRM data improves conversion rates

**75%**

agree that maintaining CRM data quality is essential to building strong customer relationships

**8 in 10**

say that data quality is essential to delivering great customer experiences

# Clearly, there is still room

for improvement

## 21%

Estimate that **less than 50%** of the data inside their company's CRM is accurate and complete

## 26%

Do not have a true 360-degree view of their customers. In fact, those working in sales were **16% less likely** than average to say that they do have a true 360-degree view of their customers

## 22%

Are not getting the email campaign results they expect

## 24%

Say that their web forms do not capture accurate data in real time

# Those with poor data quality

are missing out on growth opportunities

## 34%

Those who rate the overall accuracy, quality, and usefulness of the data in their CRM system as “poor” or “very poor” were **34% less likely** than those who rated their data as “good” or “very good” to say that data is the lifeblood of their company and a key growth driver

## 20%

Those who rate the overall accuracy, quality, and usefulness of the data in their CRM system as “poor” or “very poor” were **20% less likely** than those who rated their data as “good” or “very good” to say that their company uses data to differentiate themselves and gain a competitive advantage

# ...which leads to substantial losses

to the business

**97%**

Agree that inaccurate sales forecasts lead to incorrect operational budgeting

**8 in 10**

Agree that budget based on inaccurate forecasts could lead to insufficient working capital, high turnover rates, and/or loss of shareholder confidence

# High-quality CRM data

is about more than just reporting

## Higher-Performing Campaigns:

- Reach, segment, cleanliness
- Deliverability / sender score
- GDPR compliance

## More Efficient Go-to-Market Motions:

- Customer success (renewals)
- Sales & SDR productivity
- Marketing programs

# Job changes and old contact data

are also an opportunity to grow your pipeline with warm leads

Alumni customers are

**3X**

more likely to buy than  
your average leads

New executives spend

**70%**

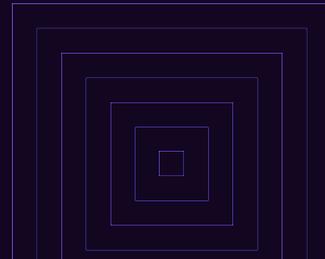
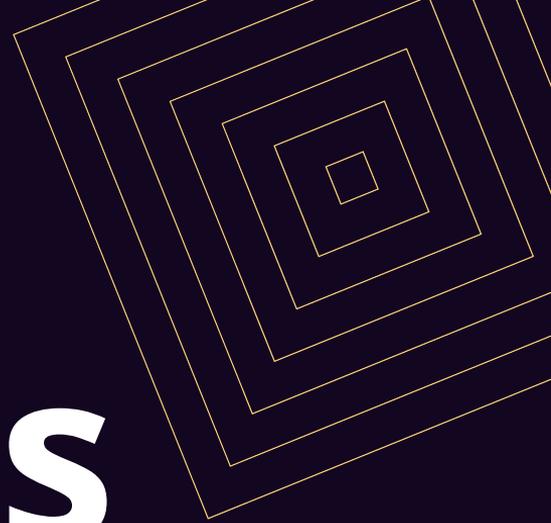
of their budget within the  
first 100 days

More than

**80%**

of professionals stay within  
their industry & function

# 6 playbooks



# 1 Extend Every Marketing Budget Dollar

## Facts:

- Overwhelmingly marketers are reporting '22 budgets going down, not up
- Meaning the old "Do MORE with LESS"
- Start with the who
- Start clean
- Direct Mail is very much back in play, people's locations are now pretty permanent and it's a high value interaction for people that matter.

## Tips

Clean that list BEFORE you do ANYTHING.

- Remove/merge duplicates
- Remove inactives

Verify your customer data

- Addresses (Both email and physical)
- Phone numbers

## 2 Protect Your Sender Reputation

### Facts:

- Email isn't DEAD volume is up 94% YoY
- Inbox placement rates are down 9% YoY, mailbox filtering algorithms are getting more and more difficult.
- Recipients are getting more and more selective open rates are down 5% YoY, click through rates are down 4% YoY.
- Benchmark for subscriber churn is 25%-33%

### Tips

Learn your subscribers' preferences and FOLLOW them.

Understand where there are signs of life and be willing to say goodbye to where there aren't.

Give your subscribers a reason to speak to you.

Find a solution that tells you more than "delivered"

# 3 ABX account prioritization when previous customers / new exec joins a target account

## Facts:

- Response rates for cold emails are dropping another 25% yoy
- New execs spend 70% in the first 100 days
- Alumni customers are 3X more likely to buy again

## Tips:

- Set Paid Ads' criteria targeting people within target accounts that were promoted or switched organizations in the last 90 days
- Target the entire department too (ENT) or company (MM/SMB)
- Orchestrate with sales outreach cadences

## 4 Warm leads: Previous customers joined a new company

### Tips:

- Subject line “Congrats” get 200% more open
- No CTA in your first email. Goal is to stay top of mind.
- Reconnect in 30-40 days with CTA
- Don't forget end-users (admins, casual users). Sync your product user base & NPS scores to your CRM.

### Subject: Congrats, {name}!

Hi {name} -- Congrats on the new role! Hope you're settling in nicely. We'll miss you at {previous company} but I'm sure you'll be kicking butts again at {current company}.

Anything I can help, don't hesitate to reach out.

P.S: Hope this gift helps you crank in your first 100 days!

## 5 Warm leads: Previous prospects joined a new company

### Tips:

- If they were a *champion* in the opportunity, similar to reaching out to Previous Customers.
- If they were a *blocker* in a Closed Lost opp, re-target the account and other prospects.

### Subject: Congrats, {name}!

Hey {name} -- Congrats on the new gig!  
Appreciate you considering ACME while at {previous company} and hope you're already making waves at {current company}.

I came across this article "The first 90 days as a CFO" that I thought you might be interested.

If I can be of any assistance, let me know.

## 6 Warm leads: Prospects who used to work at your customer

### Tips:

- Mention their past company in the subject line
- Acknowledge that they might have no experience with your product
- Even if they didn't use your product they might have heard about the success

**Subject: Your past experience at {previous company}**

Hi {name},

[your value prop & messaging]

P.S. Noticed that you used to run marketing at {previous company}. They're a happy customer of ours, so I thought you could be interested too.

# Other playbooks to ponder...

## Account Executives

### Accelerate deals, prevent deal risk

Bring previous champions at the account into the conversation.

Or, immediately multi-thread if main contact leaves

## Customer Success

### Churn prevention & renewal

Proactively build relationship with the new point of contact and align with their new objectives.

## Account Management

### Cross-selling to other departments

When previous champion joins an existing customer account but in a different geo / function

# Additional Resources



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**Thank you!**

