

# Where 6sense meets CRM

ABM OPTIMIZATION CASE STUDY



# The big picture

## At the forefront of ABM

BOL Agency is an award-winning B2B performance marketing agency helping companies across the globe optimize – and capitalize on – an account-based approach to marketing and sales.

## Challenges

A bi-directional sync between BOL's CRM instances (SFDC and HubSpot run in parallel) required manual data entry and fixes that increased operational costs. Despite tighter controls, human error had created data hygiene issues resulting in low-quality data that had compromised the 6sense model.

## Revamped 6sense usage and results

- Pipeline growth
- Shorter sales cycles
- Increased site traffic
- Increased account > opp rate
- Improved opp > closed/won rate

Talk to an ABM expert. [Reach out today.](#)



# Rethinking 6sense





## What is 6sense?

A unified predictive Intelligence platform that captures buying signals, accurately predicts which accounts to target and when, and boosts revenue performance.

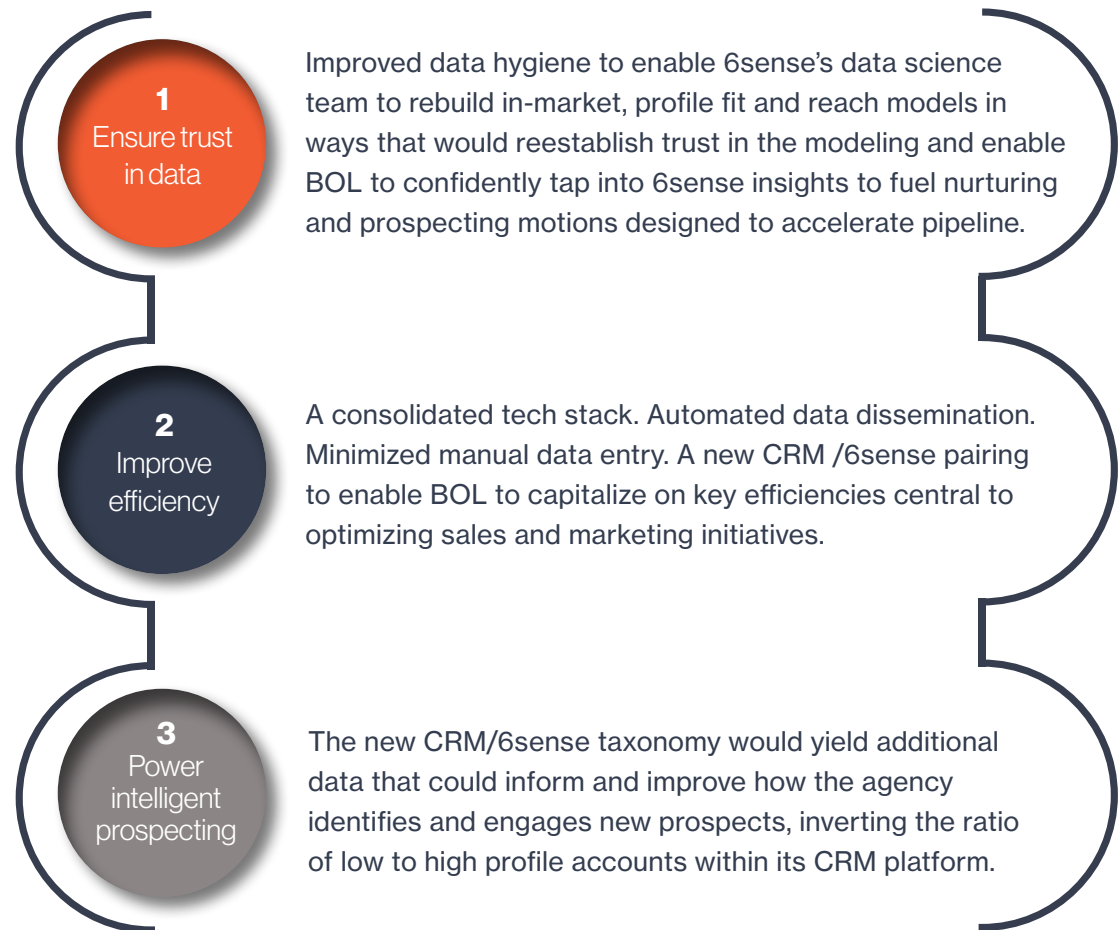
## What does it have to do with CRM?

6Sense is built on an extensible framework that allows us to natively integrate with other key tools in BOL's revenue technology stack (ie CRM, MAP and SEP) giving marketing, sales and operations teams a single source of truth that makes it possible to transform pipeline into predictable revenue growth efficiently.

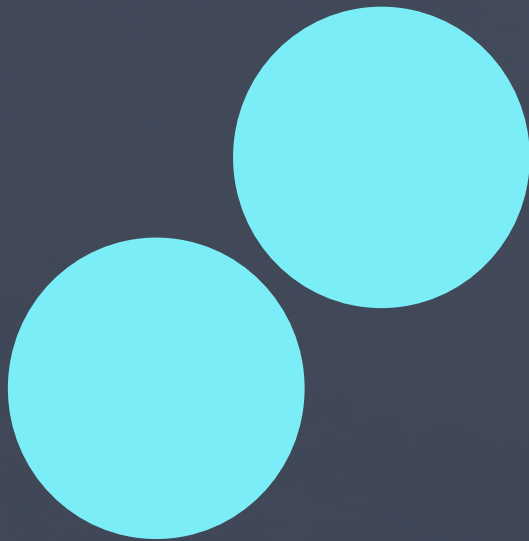
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## What goals were established?

Transitioning from SFDC to HubSpot to ensure clean, high-quality data to inject more reliable insights and signals into BOL's ABM motion. This required a new CRM/6sense taxonomy to support a number of key objectives:



# Creating a roadmap





## A phased approach

Revisiting the agency's approach to ABM and 6sense took careful planning executed in phases.

### PHASE

# 1

- Rebuild Datorama dashboards through HubSpot
- Turn off bi-directional sync between SFDC and HubSpot
- Create and implement robust CRM data hygiene protocols
- Disconnect SFDC from 6sense and replace it with HubSpot
- Refine keyword and Bombora topic taxonomies
- Refine exclusions and formalize the process for ongoing maintenance

### PHASE

# 2

- Audit and rebuild alert/proactive prospecting framework to focus sales
- Build out supplementary plays Greenfield (in-market, strong profile fit not in CRM)

Market segments

Early-stage opportunity nurture

Closed/lost win back

Upsell/cross-sell

Renewal



**Different teams.  
Unified approach.**





## Sales

### Goal

Improve prospecting across key market segments

### Benefits

- Data-informed approach
- More automation/less manual work
- Self-sustaining, seller-agnostic framework
  - Improved pipeline quality
- Optimized pipeline composition
- Better period-over-period trending

### Success

- Pipeline growth
- Shorter sales cycle
- Increased account > opportunity rate
- Improved opp > closed/won rate

## Marketing

### Goal

Build awareness across key constituencies and drive early-stage nurturing

### Benefits

- Intent-driven approach
  - True ABM
- Increased automation
- More efficient ad spend
- Resource optimization
- Self-sustaining framework

### Success

- Increased site traffic from target accounts
- Net positive progression of target accounts
- Improved marketing-influenced pipeline





## Client Services

### Goal

Mitigate the risk of churn through an improved understanding of client behaviors and signals

### Benefits

- Identify content consumption patterns that could indicate defection
- Identify content consumption patterns that could indicate the need for a BOL service currently not in scope

### Success

- Reduced churn
- Earlier risk identification
- Improved upsell/cross-sell metrics

## Analytics

### Goal

Understand key data and performance indicators

### Benefits

- Optimized pipeline composition
- Improved understanding of marketing impact

### Success

- Pipeline balance & acceleration
- Net positive progression period-over-period
- CRM alignment with target accounts



## A long-term investment in ABM

Doing ABM right is the only way to do ABM. And ensuring that the tech and tools supporting BOL's ABM program are always a help, not a hindrance has been key. In recognizing that a change needed to be made to power an efficient and effective program, BOL took a big step toward a long-term investment that will continue to pay off.

See what BOL can do to [optimize an ABM program](#) for you.