



BOL's Impact-Accelerating Audits and Optimization Strategies



Account-Based Marketing (ABM) Audits

BOL's Account-Based Marketing (ABM) audits provide critical insights into the effectiveness of your ABM program. Our goal is to pinpoint areas where ROI improvements can be made by ensuring that resources are aligned and focused on the most lucrative opportunities.



The audits cover the following topics:

1. Foundational components

Intent: We will assess the overall intent graph and its components, such as keywords, Bombora topics, and G2. Recommendations may include adding or removing keywords, clustering them, and suggesting how they can be utilized in segmentation strategies.

Exclusions: We will review current exclusion protocols, including company, URL, and inventory exclusions, to enhance the signal-to-noise ratio and reduce activation waste.

2. Data parity

This audit will help reconcile discrepancies between CRM data and its corresponding audience segments in your ABM platform. We will identify mismatches such as existing clients, named account lists, and open opportunities at various stages.

3. Audience building

We will create 1-2 sample audiences to demonstrate how your ABM platform can be utilized to analyze key audience traits, such as:

Site visitors: Analyzing the firmographic composition and in-market distribution of site visitors to gauge traffic quality and site productivity.

Pipeline composition: Understanding the distribution of open opportunities in the market.



4. Reporting and analysis

We will review and contextualize various reports to:

- Analyze the month-to-month distribution of open opportunities.
- Identify missed value potential to provide insights into lost opportunities by the buying stage.
- Evaluate account fit to assess the profile strength distribution of accounts in CRM.
- Report on segment performance to track movements across in-market cohorts for key audiences.

5. Sales enablement

We will evaluate how alerts are configured to assist sales teams in focusing and prioritizing their efforts. This includes reviewing the segmentation logic behind the alerts, the use of the sales intelligence app, and sales scripts.

6. RevOps

We will assess the setup and configuration of orchestrations in your ABM platform for the automated dissemination of data between systems. This evaluation will focus on how these configurations support specific business motions.



Email Marketing Audits

BOL's Email Marketing Audits are designed to evaluate and enhance your existing email initiatives, campaigns, and sales engagement strategies. Our goal is to pinpoint areas for improvement and devise effective strategies to boost overall email performance and lead generation.

The audits cover the following:

1. Analysis of the current email platform

We will review the client's existing email platform and marketing/sales communications.

2. Evaluation of performance metrics

This includes assessing deliverability rates, engagement levels, and list health, depending on the data available from exports and historical CRM platform access.

3. Customer journey analysis

We will examine the current customer journey and provide recommendations on how to improve and build upon it.

4. Strategy assessment

We will identify strengths and weaknesses in the current email marketing strategy that impact email performance and engagement, and we will suggest strategies for improvement.

5. Content review

Our team will assess the current email templates, creative elements, and content, including compliance with relevant communication and outreach laws based on the client's provided information.

Upon conclusion of the audit you will receive:

1. Email audit report

A comprehensive document will be prepared, detailing the audit findings and suggesting areas for improvement.

2. Go-to-market plan

A comprehensive engagement strategy including target audience segmentation, guidance on audience expansion, and content recommendations tailored to industry best practices.

3. Implementation roadmap

We'll prioritize recommendations based on their impact and ease of implementation, identify opportunities to streamline and automate your campaigns, and suggest improvements for future campaigns.





Email Nurture Audits

BOL will provide comprehensive email nurture consulting and strategy services. Our goal is to enhance your email engagement and drive leads by optimizing every interaction with your audience.

Depending on the available materials, BOL will:

- Review your existing journey flow, including the number of touchpoints, delivery timing, and cadence.
- Analyze email template(s), messaging, and content within each touchpoint.
- Evaluate calls-to-action (CTAs).
- Review any available audience criteria, segmentation, and suppressions.
- Identify strengths and weaknesses in the current email marketing strategy, especially as they impact email and engagement performance.

Upon completion of the audit:

- You will receive recommendations and guidance to address any identified issues within the email ecosystem.
- A go-to-market plan for executing effective email campaigns will be developed. This will include target audience segmentation, expansion guidance, and content recommendations based on industry best practices, supplemented by marketing efforts supporting sales outreach programs.
- Prioritized recommendations will be offered based on their impact and ease of implementation.
- Opportunities to streamline and optimize automated campaigns will be identified.
- The results will be compiled into a detailed implementation roadmap outlining the findings and providing recommendations for improvement.
- Reports and recommendations on deliverability metrics, engagement rates, and list hygiene will be generated.
- Other data insights and analysis will be provided.



Conversational AI Audits

Conversational AI chatbots like Drift can significantly enhance customer engagement and streamline operations in B2B businesses. By automating interactions and providing instant responses, these AI-driven tools improve lead generation, customer service, and overall business efficiency.

BOL will provide comprehensive conversational AI support to enhance your customer experience. We take a phased approach:



Phase 1: Build & Learn

Continuous improvement: Establish growth priorities and continuously improve functionalities.

Playbook development: Strategize and prioritize the building of new playbooks to guide chatbot interactions.

Performance audit: Conduct performance audits of existing live playbooks to assess their effectiveness.

Monitoring: Keep track of coverage and conversion rates to ensure optimal performance.

Routing rules: Ensure proper routing rules are in place to alert sales teams efficiently.

Benchmarking: Review results against industry benchmarks and provide data-driven recommendations for additional playbook development.

Phase 2: Improve

Refinement: Refine and adapt playbooks based on real-time interaction results to enhance effectiveness.

A/B testing: Test different placements, offers, triggers, and flows to optimize user engagement.

Routing revisions: Revise routing protocols to ensure sales teams are notified at the optimal time for engagement.




Phase 3: Grow

Targeting refinement: Refine targeting criteria to better engage the most important audiences and maximize impact.

Personalization: Create personalized experiences for users to increase engagement and satisfaction.

Expansion: Identify new use cases for the chatbot to expand its role and increase user engagement across different areas of the business.



Interested in any of
our ROI-improving,
growth-driving audits
and optimization
strategies?



CONTACT BOL TODAY

