

ABM Program Success

Insperty Prioritizes Outbounding at Scale Using the Triblio Orchestrator



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With the help of Triblio orchestrating our account-based efforts, we've seen about a 500% increase in SDR efficiency.

Rich Whittington

Manager of Account-based Strategy & Development, Insperty

Challenge

Insperty, a premium human resources and business solution, has been servicing America's best businesses for over three decades. With a total addressable market of 6.6 million businesses, Insperty's go-to-market team is constantly searching for more efficient and effective ways to

1. Add new business performance advisors at scale
2. Leverage data science to surface actionable insights
3. Maintain growth momentum and profitability

The company's recent investments in account-based marketing (ABM) have addressed all three of these growth objectives. As Rich Whittington, Insperty's Manager of Account-Based Strategy and Development, puts it, "Insperty's mission is to help small businesses succeed so that communities prosper. What we really wanted to do with account-based is do that in volume."

Whittington, who's responsible for feeding the sales team with high-quality accounts, saw the opportunity for ABM to modernize the company's legacy marketing and sales methods. He embraced two initiatives that set the foundation for a successful ABM program: building a sales development function and implementing technology to prioritize and segment target accounts at scale.

Without intelligent insights and workflows, the new team of sales development representatives (SDRs) did not have the capacity to support all of Insperty's business performance advisors and boost productivity. The SDRs were outbounding for more than 80 district offices across 12 sales regions, and intent analyses showed that they had 30,000 high-fit and high-intent accounts to reach out to in any given week. At the time, each SDR was spending 20 percent of their time building and cleaning lists, and each week, they'd cover less than half of Insperty's high-fit, high-intent accounts.





Fit Intent Recency Engagement

Insperity uses FIRE to prioritize and segment the 6.6 million accounts in its total addressable market.

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Triblio offered exactly what we were looking for in a strategic account-based partner. They show a high desire to solve our deepest business challenges.

Rich Whittington

Manager of Account-based Strategy & Development, Insperity

ABM Program

Insperity partnered with ABM solutions like Triblio, specifically Triblio's orchestrator, to implement a new technology-backed account-based strategy centered on FIRE (fit, intent, recency, and engagement).

Triblio and Insperity Partner to Implement FIRE Prioritization

The key objective of Insperity's FIRE initiative was to limit the scope of SDR prospecting to only the highest value accounts, thus improving sales efficiency. Triblio's role was to automate this prioritization by identifying hand raisers, enriching data with engagement, and delivering actionable insights to the sales team.

“The value of Triblio orchestrator is that it delivers on the value proposition of our FIRE data strategy,” said Whittington. “When we're feeding through high fit, high intent accounts, we can now append the engagement data to those accounts, empower our SDRs with that information, and it allows us to prioritize an SDR's day.”

With Triblio, Insperity was able to identify accounts showing not only third-party intent but also first-party website engagement, marketing automation engagement, and CRM activities. The combination of various signals of interest gave marketing a fuller picture of each target account's purchase intent, allowing the marketing team to feed through the highest value accounts to the sales team. These insights gave sales reps the confidence that they were talking to the right people at the right time with the right message.

Dual Funnel Enables Smooth Transition to ABM

Insperity did not drop its legacy funnel and switch over to ABM all at once. Rather, the company ran both funnels side-by-side. The focus was on expanding the use of account insights throughout the funnel and fostering a concerted effort to go after target accounts.

Under Insperity's leads-based model, marketing expertise stopped when the discovery call was set. While not uncommon, a clean handoff between marketing and sales like this prevented sales people from getting their hands on useful account insights that could help further their conversations.



ABM gave Insperity’s marketing and sales teams the insights and triggers they needed to put the right campaigns in front of FIRE accounts throughout the funnel. The Triblio orchestrator matched inbound leads to accounts, mapped intent data to accounts, and enabled the sales team to run dynamic sales plays by intent topic. Instead of running one sales play for every account that showed some sign of interest, the SDRs could now have “a multi-play, multi-touch, multi-thread approach to the market,” according to Whittington. Insperity automated dynamic sales plays for five topic clusters: competitor intent, employee facing benefits, compliance, HR outsourcing, and recruiting.

Partnering with Triblio also helped Insperity understand its historical buyer journey (18 months to close). Triblio compared intent signals in the buyer journeys of 500 customers and 200 look-alike prospects. Then, the algorithm calculated the delta between the two to identify patterns and recognizable behaviors that drove funnel activity and ultimately closed deals. These insights have continued to be extremely helpful in campaign planning and subsequent strategy discussions.

Setting Account-Based Goals Across the Funnel



ABM was brought on to help operationalize all of Insperity’s go-to-market motions, from infrastructure to account selection, marketing engagement, sales enablement, and measurement. How was the marketing team planning on proving the impact of ABM in each of these areas?

Insperity committed to measuring the following:

- Value - Was the content resonating with target accounts?
- Volume - How many accounts were the SDRs reaching out to each week? Does this activity sync up with SDR capacity?
- Velocity - At the top of the funnel, what were the SDR efficiency scores? For mid-funnel accounts, what are their levels of engagement? At the bottom of the funnel, what is the impact of ABM on sales metrics (e.g. lifetime value, ARR, win rate)?

Properly setting up clear and measurable goals was foundational to Insperity’s ABM success.



Results

Insperity sees early wins and 500% increase in SDR efficiency

Insperity closed a deal within the first month of turning on the Triblio orchestrator. From first discovery call to closed-won, this deal had a 20 day sales cycle, cutting Insperity's average sales cycle by more than two-thirds.

Additionally, SDR efficiency increased by 500%. Equipped with FIRE data, the SDRs were able to focus their outbounding and significantly increase the ratio of discovery calls set against the number of target accounts identified. Plus, in delivering lists that fit the capacity of each SDR's work load, the Triblio orchestrator eliminated the need for SDRs to spend time each week building and cleaning lists manually.

"Triblio offered exactly what we were looking for in a strategic account-based partner. They show a high desire to solve our deepest business challenges," said Whittington. The partnership has used Triblio's comprehensive ability to make sense of account insights and automate custom-fit workflows. As the program continues to scale, FIRE-based prioritization is flexible and dynamic enough to continue to improve Insperity's segmentation strategy and sharpen both marketing and sales messaging.

First deal closed in **20 days vs 70 day** average sales cycle

Triblio Orchestrator
Turned on

Jan 6

First Discovery
Call Complete

Jan 30

Deal
Closed

Feb 19