



**How Planful boosted
reach and engagement by
over 300% using
downstream intent data**

Company: Planful

Employees: Over 400

Industry: Corporate Performance Management (CPM) Software, Cloud FP&A

About: Planful is the pioneer of end-to-end financial close, consolidation, and financial planning & analysis (FP&A) cloud software. The Planful platform is used by the Office of the CFO around the globe to streamline business-wide planning, budgeting, consolidations, reporting, and visual analytics.



The challenge

Planful is cutting-edge software that helps finance and accounting leaders drive faster and more collaborative planning and close cycles in all areas of business. Rowan Tonkin, CMO of Planful, runs a lean and effective team that wanted to build their ABM efforts to complement top-of-funnel marketing campaigns.

Demand generation leader Emily Ross knew Planful needed to gain mindshare over its competitors. Her objective was to drastically increase their account reach and engagement through smarter segmentation and move accounts further down the buyer's journey and ultimately to purchase.

TrustRadius has been a true partner across our team—from growing our review content to enhancing and executing our ABM strategy, they are a key part of our recipe for success.



— ROWAN TONKIN, CMO | PLANFUL



The outcome

The Planful marketing team partnered with TrustRadius to use their downstream intent data within the 6sense platform to reach and engage in-market accounts, moving them through the buyer's journey.

Planful saw **over 15% of accounts in a target segment increase their buying stage**. They saw up to 56% of accounts move from awareness to consideration stage.

Planful's target buyers tend to be sophisticated, and a majority of them do not click through the ads, but would see the ads and land on their website later. This is a key metric on 6sense called view-through rate (VTR), which also showed high performance.

The campaigns showed high return on ad spend (ROAS), reaching almost 2,000 accounts for less than \$4 per account and engaged over 30% of them—a **300% increase on reach and engagement** across the board.

Planful's recipe for success

Build campaigns to reach audiences in specific buying stages

The Planful team gave prospects a reason to mature through the buying process. When buyers realized they had a problem to solve—they were **problem aware**—they began by doing research to understand the issue further and Planful was there giving them educational content.

In the next stage, **solution aware**, prospects were more likely to be influenced by Planful since they were serving educational content to their prospects. Then,

as the buyer became more **product aware**, researching actual products to support their solution, Planful used TrustRadius downstream intent data to know who to reach and influence. They are mid- to bottom-funnel prospects who should be met with relevant and highly targeted campaigns and offers that lead to conversion.

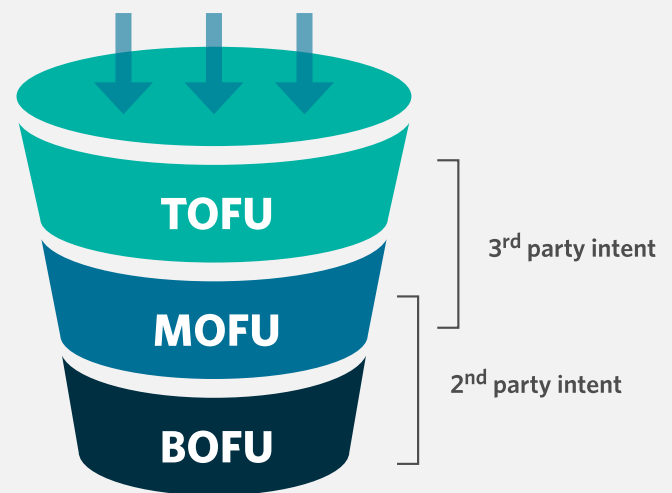
The Planful team prioritizes two core business segments for growth. Historically their campaigns in 6sense have been generic and focused on a **problem aware** audience. Partnering with TrustRadius, they were shifting their focus to engage audiences who were more downstream.

Problem Aware: A person knows they have a problem, but doesn't know there are solutions to that problem.

Solution Aware: A person knows there are solutions, but hasn't chosen one and doesn't know about your product.

Product Aware: A person knows about your product, but isn't totally sure it solves their problem.

Most Aware: A person knows a lot about your product. They are on the cusp of buying, but need to know the specifics.



Rich content drives strong intent signals

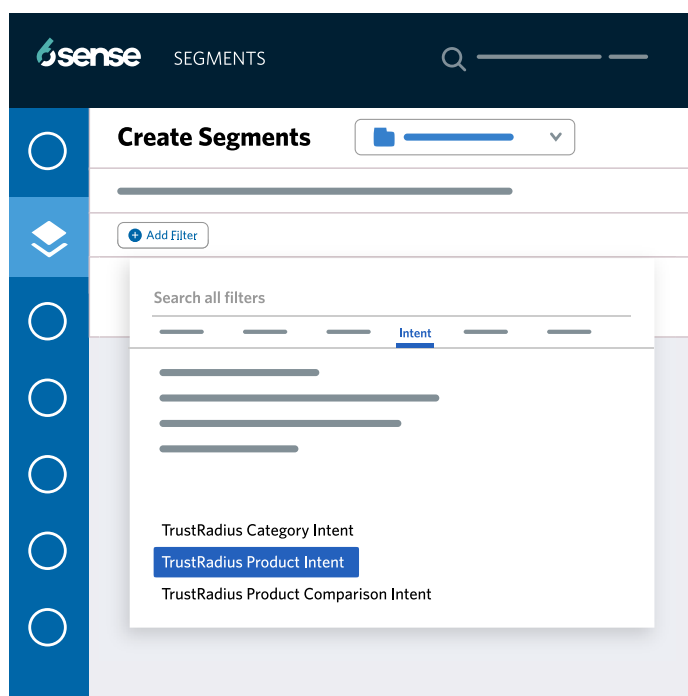


Planful's product is top-rated on TrustRadius, with a high score of 8.7 out of 10 and trending up. Planful's customer marketing team continues to invest in getting user feedback. They drove over 80 in-depth reviews with many highly impactful quotes tagged—which they use in their own marketing messages.

Strong and reliable buyer intent signals are an outcome of high quality content

TrustRadius has an acute focus on driving long-form reviews with over 400 words, producing three usable quotes on average per review. TrustRadius reviews are rich and unique as brands can use custom questions to reveal the most important value propositions and help tell their narrative effectively. When users are spending over 12 minutes reading detailed reviews and comparing products against each other on TrustRadius, the intent signals generated are highly indicative of mid-funnel purchasing intent.

Emily's team leverages the benefits of this rich content from end to end. They use several user quotes, high scores, top-rated badges, and the buyer intent data produced as a result of all the content to fuel their demand generation strategy.



Aligning tools and data to increase effectiveness and efficiency

Emily had a clear vision for demand generation to be successful. She knew from experience that aligning data and tools would be her first and biggest hurdle to clear. With help from her teammate Angel Jimenez, Planful's marketing operations lead, this hurdle turned out to be much simpler and faster to clear than Emily anticipated. Angel helped set up the TrustRadius Salesforce Connector, which is free and quick to install. The Connector helped Emily and her team to access all of their intent data on demand, run instant reports, and deploy the data into other systems.

Angel also set up the 6sense platform integration — which enables Emily to use TrustRadius downstream intent data to create dynamic segments seamlessly within 6sense. This integration eliminates any manual uploads of data and makes it easy to include TrustRadius intent data in any ABM campaign. This saved Emily's team a lot of time and set them up to scale their outcomes.

Aligning data and tools is typically one of the hardest parts. TrustRadius really makes things smooth and fast, building intuitive integrations with 6sense and Salesforce.



— ANGEL JIMENEZ,
SENIOR MANAGER, REVENUE OPERATIONS | PLANFUL

Report: Accounts with TrustRadius Activities
Ideal customer profile accounts

Total Records
11,938

Account	Company Size	Country Code	Activity Label	Description
Acme Co.	5,000 to 10,000	US	Product	Clicked a pricing CTA for Planful
	100,000+	US	Comparison	Viewed a comparison of Planful vs Workday
	5,000 to 10,000	UK	Category	Viewed the CPM Software category
	100,000+	JP	Comparison	Viewed a comparison of Planful vs Anaplan
	100,000+	CA	Product review	Shared a Planful Review

Success begins with the right audience

The Planful team had a strong repository of content when they began working with TrustRadius intent data. They wanted to target their two core business segments with distinct campaigns and content based on the account's buying phase. Emily was looking to implement a process that is scalable—she wanted to ensure end-to-end continuity of the campaign for these two segments.

Planful had their buyer's journey mapped out, along with a clearly defined ideal customer profile (ICP) to reach and influence their target buyer. They target seven different titles within specific revenue bands, matching them with buying stages in 6sense. They narrowed down their target list to hyper-focus their campaigns for an audience showing the highest intent to purchase.

planful

Still searching for a CPM tool?

Planful has saved our plant controllers, corporate controller, and myself hours of time each month.

—FP&A Manager, Oil & Energy Company

[Get a Demo](#)

TrustRadius
Top Rated
2021

Building campaigns with compelling content

Emily wanted to change the course of Planful's ads, which had mostly been generic and designed to drive awareness with limited segmentation. She was confident that the TrustRadius audience segments would lead to a better outcome, since these audiences are already familiar with the value of TrustRadius content. They are also likely exposed to the Planful brand, or at least familiar with the *Corporate Performance Management Software* category Planful competes in. Emily's team created ads built with these elements—user quotes, badges, and a down-funnel offer to be relevant and compelling to their audience.

Aligning our content and offer to the buying journey was key to our campaign success. This is easier said than done—driving consistent messaging, creative, and landing page content. But the rewards are worth the effort.

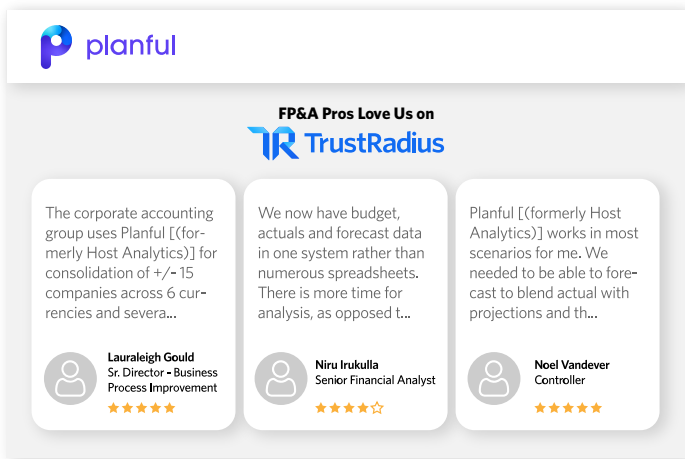


**— EMILY ROSS,
SR. DEMAND GENERATION MANAGER | PLANFUL**

Creating context that converts

Planful’s ad campaigns lead the audience to the relevant solution pages on Planful’s website. These pages have contextual user quotes embedded through customized TrustRadius widgets that have proven to improve conversion on the page by up to 70%.

Planful’s customer marketing team works closely with the TrustRadius Research team to use custom questions in their user review process—which helps curate a desired brand narrative and create a library of helpful quotes to use in marketing.



Connecting the dots to revenue

Emily’s team completes the ABM motion with intent data with several ways for their sales team to take action on the intent signals. They alert their SDR and sales teams using Salesforce reports, emails, and Slack notifications to match their mode of communication, making action easy.

TrustRadius downstream intent signals are captured and delivered at the account level. To help the sales team reach out and engage with the right contacts at every account, Emily’s team uses tools like LinkedIn, Zoominfo, and Drift Prospector to fill the gaps. Much of the contact-level information can also be delivered through an i-frame within Salesforce.

The screenshot shows a table titled 'TrustRadius Activities (10+)'. The table has five columns: Date, Activity Label, Activity, Description, and Record. It lists several activities related to Planful, including product clicks, comparisons, category views, and product reviews.

Date	Activity Label	Activity	Description	Record
	Product	Click	Clicked a pricing CTA for Planful	TRA-01023
	Comparison	View	Viewed a comparison of Planful vs Workday	TRA_01024
	Category	View	Viewed the CPM Software category	[Link]
	Comparison	View	Viewed a comparison of Planful vs Anaplan	[Link]
	Product reviews	Share	Shared a Planful Review	[Link]

“Buyers these days want to self-educate and TrustRadius helps us track a lot of that activity. Helping our sales team take action on it is critical for us.”

— ROWAN TONKIN, CMO | PLANFUL

Up-leveling ABM for scale

The Planful team achieved their intended outcome to reach and engage in-market buyers and effectively move them forward in their buying journey.



15%

Over 15% of accounts increased buying stage

+12% Awareness stage
+56% Consideration stage
+13% Decision stage

300%

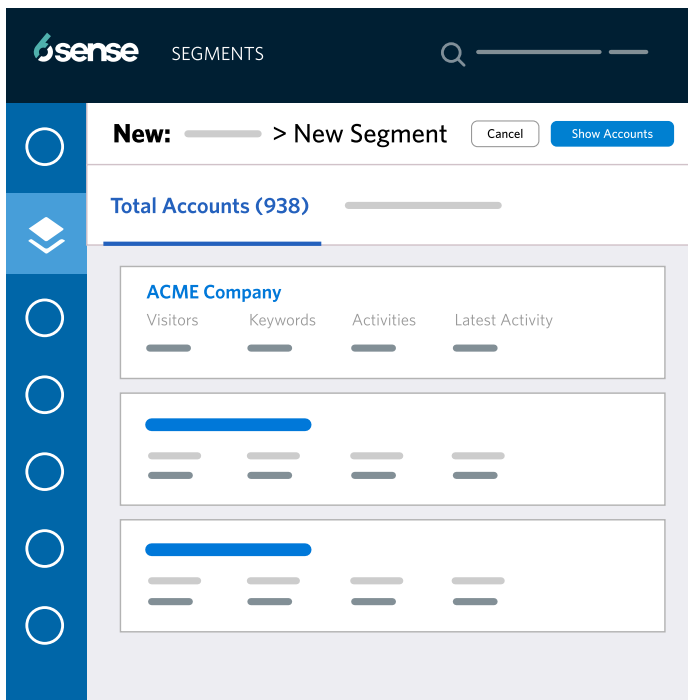
Over 300% increase on reach and engagement across the board

Reached almost 2000 accounts for less than \$4 per account and engaged over 30% of them

Additionally, Emily's team saw an above-average CTR (click-through rate) and VTR (view-through rate) for their ad campaigns. Account VTR is an important metric when reaching a new audience. Savvy buyers who see ads but do not click on them often visit the company's website from brand exposure.

Emily was successful in laying the foundation for a program that the Planful team can continue to build on over time—test new ads using the same audience segments to optimize campaign performance.

Emily plans to scale their positive outcomes and test ads targeting accounts where buyers are researching Planful, but haven't visited the website. They also plan to target accounts that visited their website in the past 30 days but did not convert on a goal.



Working with TrustRadius intent data helped us up-level how we construct campaigns. For the first time, we can follow how target accounts in different revenue segments move through the funnel.



— EMILY ROSS,
SR. DEMAND GENERATION MANAGER | PLANFUL



How intent data could fill your pipeline

Buyer intent data lets you see deep into the “dark funnel” and reveal all of the anonymous buyers evaluating your product right now. This is the secret weapon that could fill your pipeline for the year. The TrustRadius team can walk you through

our platform and show you the ropes with a full month of *FREE* downstream intent data. No strings attached. We believe that intent data is the future of successful sales and marketing. Give it a try and see for yourself.

Want to learn more about TrustRadius and activating buyer intent data?

Reach out to hello@TrustRadius.com