

# Real-Time Insights for Personalization

## CASE STUDY



**Industry**  
SaaS

**Location**  
Somerville, MA

**Website**  
[www.evergage.com](http://www.evergage.com)

## Meet Evergage

Evergage's real-time personalization platform delivers [The Power of 1](#), enabling digital marketers to transform the dream of 1:1 customer engagement across channels into reality. Combining in-depth behavioral analytics, a full customer data platform and advanced machine learning, Evergage provides the one platform you need to systematically understand and interact with each person that visits your site or uses your app – one at a time, “in the moment” and at scale – to deliver a maximally relevant, individualized experience.

## Clarity into Closed Won

When Andy Zimmerman took on the role of Chief Marketing Officer at Evergage, he encountered demand generation analysis challenges similar to those he faced in previous roles. However, he found the solution he had been searching for with FunnelWise.



“You can outline a process for going after leads, generating interest and running campaigns, but if you don't have a **sense of how leads flow through to sales opportunities and closed won business**, you can't really evaluate the effectiveness of one campaign to the next.”

– Andy Zimmerman, Chief Marketing Officer

Evergage has streamlined this process using FunnelWise. The marketing team has gained insights into campaign performance and conversion rates and now makes confident data-driven decisions related to key marketing program investments.

# EVERGAGE CASE STUDY: REAL-TIME INSIGHTS FOR PERSONALIZATION

## Looking Back to Plan Forward

One of the key ways Zimmerman uses FunnelWise is for quarterly planning. Prior to FunnelWise, he spent roughly 10 hours on the process. Now, he is able to pull data from past quarters to more accurately plan for the upcoming one in around two hours. And he has more accurate and complete data he can trust.

According to Zimmerman, FunnelWise provides his team access to historical metrics that are not tracked in Salesforce and significantly reduces his reliance on spreadsheets. He's also able to determine which campaigns produce better results and make better decisions on where to invest time and resources.

## Going from Impossible to Possible

When asked to quantify time saved for monthly reporting, Eileen Chow, Evergage's Director of Demand Generation & Marketing Operations, shared, "When pulling monthly metrics, FunnelWise gives us more data than we would have otherwise. We basically wouldn't be able to get this level of information without it."

One use case Chow values is viewing net new respondents by lead source for different time periods and funnel stages, saving her from difficult data manipulation. "I was happy we could identify people who were being disqualified between the time they were created and the time we reported on them," Chow stated.

"In **terms of attribution** and having a better view of what is happening, FunnelWise gives a **more complete view of funnel leakage** and **where the movement is** versus our 'best guess.'"

– Eileen Chow, Director of Demand Generation & Marketing Operations



Zimmerman added, "It went from impossible to possible."

## Confidence in Reporting

"There is less guessing and more confidence in what we are reporting," said Zimmerman. "When sharing with the executive team, I can go in at any point and say, 'Here's what it is.' Not 'Here's what I think it is.'"

Since implementing FunnelWise, Evergage has also noticed a shift in the conversation with sales. Instead of focusing on where the data is coming from, the focus is on demand creation strategies and methods. Zimmerman said this trust in data has led to more efficient conversations within the marketing team and between marketing and sales.

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## Delivering Accuracy

Evergage also has gained greater accuracy with its use of FunnelWise. Zimmerman shared that he sets quarterly goals for each marketing program by taking into account the historical metrics in FunnelWise, and his team has consistently achieved or exceeded these goals.

“FunnelWise is a **major contributor** to us being able to **accurately project** our top-of-funnel metrics.”

– Andy Zimmerman, Chief Marketing Officer

For her day-to-day, Chow said she checks FunnelWise more and more. It allows her to monitor progress to goals. Zimmerman added that the visual indicators allow them to quickly determine if they are on track and confirm the pace of business.

## Flexibility for New Strategies & Reporting

As Evergage built an Account-Based Marketing (ABM) funnel for target accounts, they were also able to use FunnelWise to view the data in several different ways – by industry or Enterprise vs. SMB, for example. “It was easy to slice and dice the data,” Chow shared.

FunnelWise also allows them to specify if Evergage wants to track aspects based on historical data versus the current value in Salesforce. “It’s extremely valuable that we get that granularity to choose,” said Chow.

## Confirming Capacity

Evergage has also used FunnelWise to diagnose possible issues. Chow shared how using funnel metrics, they were able to confirm which territories were in need of additional support.

“We had the data to back up the hypothesis,” she said. “We could determine not only the sheer volume of leads but also how many were actually workable.”

## Learn How Data-Driven Marketing Can Work for You

FunnelWise has given Evergage the ability to better connect marketing to revenue, streamline planning and reporting, implement new strategies and verify issues and successes. See how you can become a data-driven marketer with FunnelWise.

[PROVE THE POWER OF MARKETING](#)