

## Case Study

# Enabling New Business Opportunities at Cleo with Brainshark

**Cleo**

**“Without Brainshark, our business development reps wouldn’t be able to hit their quotas.”**

- Shane Phair, Director of Business Development, Cleo



## Campaign and Content Challenges Result in Missed Opportunities

Tasked with pitching Managed File Transfer solutions to prospects, the business development reps (BDRs) at Cleo were coming up short month after month. They were responsible for booking a number of outbound qualified appointments every 30 days – however, the team wasn’t always getting the necessary leads and found it challenging to find the right content to facilitate successful conversations.

**“Brainshark has been instrumental for the BDRs to generate the right quantity and quality of sales appointments.”**

- Joe Dupree  
VP of Marketing

To figure out where they were going wrong, the business development and marketing teams pulled back the curtain on the lead generation process. They found the marketing team was sending plenty of email campaigns to prospective customers, but having trouble engaging their target audiences. On top of that, they didn’t have insight into why the email content was ineffective.

“We had been spending a tremendous amount of time, energy and brainpower crafting various thought leadership pieces, whitepapers, webinars, blog posts and brochures,” says Joe Dupree, VP of marketing at Cleo. “But we weren’t reaching our intended audiences, and people weren’t sticking around long enough to get the whole message about us.”

As a result, BDRs lacked the right number of quality leads and chased down opportunities that weren’t worth their time. So Dupree, along with director of business development, Shane Phair, sought a way to fill this gap by looking for a technology to

give marketing campaigns a lift – and make it easier for BDRs to find relevant content to share with their most qualified leads.

## Technology that Makes a Difference for Both Sales and Marketing

Phair and Dupree looked for a solution to fit with their existing tech stack, which included Salesforce and Marketo. They also needed a platform that would provide rich analytics and an easy place to organize all types of content, including sales training and marketing assets.

With Brainshark, they saw huge potential in the combination of capabilities for content creation and practical applications for sales training and onboarding. They were also attracted to Salesforce as the central hub for all sales content, whether it was developed using the Brainshark solution or not.

“When it came time to figure out how to increase the impact of our marketing and brand exposure, it was an easy decision to move to Brainshark,” said Phair.

Cleo adopted the Brainshark Sales Accelerator to develop content for marketing and sales training, and to make that

### At a Glance: Cleo

**Problem:** BDRs not hitting quotas; email campaigns not effective with target audiences

**Solution:** Engaging content; rich marketing campaign analytics, with Salesforce as central hub

**Result:** Lead conversion rates 156% higher with Brainshark content, each BDR boosted productivity 50%

content accessible to BDRs and sales reps right from Salesforce. They were excited that there was something for everyone: the ability for the marketing team to easily create engaging, video-based content and track audience engagement, and the accessibility for BDRs to find and use training and sales content anytime, all from within the CRM.

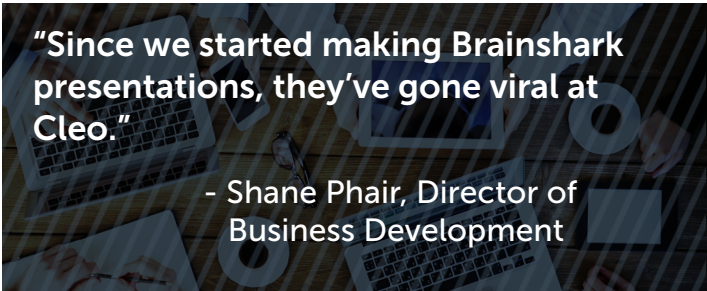
## The Content BDRs Need – Right When They Need It

Once Brainshark was implemented at Cleo, the marketing team quickly saw increased engagement with email campaigns. Voice-enriched video content created with Brainshark made a world of difference in prospects' interest levels in the email messaging.

"We have a predominant share of the pipeline with opportunities that we've been able to secure because someone was sent a link to a Brainshark video, clicked on it and watched it," says Dupree. "They stayed tuned and their expression of interest resulted in them receiving a follow-up call and sales appointment."

While the value of Brainshark started with the marketing team, it really blossomed with the BDR team. Sales Accelerator transformed the BDRs' whole work stream, creating one central place to locate content in times of need.

"Before, it was hard for BDRs to access our content. We were using shared folders but the BDRs lived in Salesforce," Phair says. "Now when they're on the phone with a prospect, they can go right into the record and send content through Salesforce and have it tracked."



**"Since we started making Brainshark presentations, they've gone viral at Cleo."**

**- Shane Phair, Director of Business Development**

The BDRs could also see how the content performed after sending it to prospects. As a result, the team could more accurately allocate their efforts for follow-up conversations and each BDR was able to increase their productivity by 50%.

"Without Brainshark, the BDRs wouldn't know where to start. We are in the IT space and sell to a wide range of companies in multiple verticals, across many use cases and job titles," says Phair. "Brainshark allows us to measure engagement with customers and with reports in Salesforce. BDRs can see who is engaging with Brainshark content, which allows them to prioritize follow-up. If they aren't calling the right people, they won't be successful."

## A New Way to Onboard and Train

Being able to create and send out content quickly in a repeatable process has also been beneficial to the BDR onboarding process. Since Brainshark presentations are built in a format that can be repurposed, it's easy to reuse content for new crops of BDRs. Many reps don't stay in their roles for long tenures; they're promoted or move on to other roles within the organization. With Brainshark, Cleo has been able to cut BDR onboarding time from three weeks to four days.

Next, Dupree says, they plan to use Brainshark to revamp the onboarding process for the entire sales team, which currently runs as a week-long boot camp.

"Today [sales onboarding] is an ugly process. We're reluctant to make staffing moves because of the pain of onboarding," Dupree says. "We yank everyone's calendars for a week, run a boot camp and fly everyone in and firehose them to death with in-person materials. It's really disruptive to schedules and lackluster in effectiveness."

Cleo has started to use Brainshark to build on-demand training with quizzes for onboarding, which they say will save money, give reps control over their own training and, ultimately, have a longer shelf life than in-person sessions.

## Brainshark Goes Viral Across Cleo

Brainshark has also been the catalyst for achieving tighter marketing and sales alignment at Cleo. It's allowed them to more clearly see the value each department can bring to the table.

For example, "Every single one of the opportunities beyond the qualified stage came from the lead generation team and a predominant share of those were as a result of Brainshark videos," Dupree says. Specifically, lead conversion rates are 156% higher with Brainshark content, compared to non-Brainshark content.

The demand for Brainshark content has skyrocketed more broadly across Cleo too. Virtually every day, says Phair, they've gotten at least one request for a new Brainshark presentation. He hopes to extend Brainshark capabilities to the entire sales organization and fully transform onboarding programs.

"When we started there was curiosity," explains Phair. "Once they saw the results, every rep and manager wanted everything in Brainshark."

**For more on Brainshark's sales enablement solutions:**

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