



SOPHOS

Customer name: **Sophos**
Industry: **IT security and data protection**
Business Need: **Sophos sought an advanced, enterprise-ready marketing technology solution that would support its marketing department's evolving campaign and lead management requirements**

Sophos had always benefitted from basic marketing database centralization, but the downside was that everything – every touch, every lead - went into the CRM system. That process hampered Sophos' legacy system and made lead follow up more inefficient.

Sophos spent several months evaluating marketing technology vendors against a specific set of criteria that included the ability to handle its multi-touch reporting requirements and manage tiered campaigns on a global level.

Additionally, Sophos knew it would eventually transition to a new CRM system, so the marketing solution had to be flexible enough to not only integrate with Sophos' existing IT infrastructure, but with whatever system the company eventually selected.

Being an IT security company, it was also very important that Sophos work with a vendor that was conscious of security and could demonstrate a commitment to data protection and privacy. As a result of its evaluation, Sophos selected Neolane's conversational marketing technology.

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“Neolane proved to be the only enterprise-class marketing automation solution that could help us manage a number of different campaigns with varying levels of complexity on a regional and global level.”

Rob Schlansky,
IT Director – Marketing,
Sophos

Sophos sends approximately 200 email campaigns globally each month, with two to three variations for A/B testing. These campaigns include license renewals and security alerts as well as invitations to webinars and regional events. As Sophos grew its customer base and expanded into new global regions, the marketing department needed to be able to scale and improve lead management processes, without adding more resources.

"Traditional sales cycles don't necessarily exist at Sophos. Our marketing needs are unlike typical B2B organizations due to the nature of our subscription-based solutions. Our multi-touch campaigns use several metrics to track which activities effectively move prospects into the pre-buying

- **Salesforce.com for CRM, Sitecore for web CMS**

RESULTS

- *Increased campaign efficiency, cutting cycle times and supporting increased activity with no additional headcount*
- *Automated response handling for hundreds of global and regional campaigns each month*
- *Improved insight into which activities effectively move prospects into the buying cycle and generate revenue*
- *Supported smooth transition to Salesforce.com, with seamless integration and information flow between the two systems*
- *Future-proof platform can effectively support Sophos' growth and increasing marketing sophistication over time*



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on a regional and global level," said Rob Schlansky, IT Director – Marketing, Sophos. "Neolane stood out based on its ability to clearly articulate strong value propositions and establish best practices associated with data protection and privacy. The platform is also UTF-8 compliant, providing support for Japanese characters, not something every vendor is capable of."

The Results: Automate Response Handling and Ease Salesforce.com Transition

With Neolane, Sophos can automate response handling for hundreds of campaigns each month. Leads are cleansed, deduped and quickly processed in Salesforce.com. Sophos is now applying the benefits of automation to the customer lifecycle process, streamlining the ability to stay ahead of customer communications like sending renewal notices associated with upcoming license expiration.

Just as important, the Neolane platform is flexible enough to support Sophos' increasingly granular multi-touch reporting and attribution requirements that track and analyze the last prospect touch (called a "hit") and the steps immediately prior (the "assists").

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Neolane enables Sophos to adjust campaigns and focus marketing spend on high-value activities that are most effective in transforming a touch into a lead. Over time, Sophos will rely on Neolane to support increasingly sophisticated lead nurturing and scoring strategies. These strategies will allow the marketing team to better understand what

information prospects find to be of value as they move through the buying cycle, as well as allowing Sophos to make more informed business decisions about where to allocate time and budget to deliver the greatest value to prospects, partners and customers alike.

"With Neolane, we will be able to better determine logical next steps for accelerating discussions – like when to offer a free software trial following the download of a whitepaper, versus triggering a call from the sales team," said Hall.

Another substantial result of the Neolane deployment was Sophos' ability to take advantage of the Neolane connector for Salesforce.com. Today, Neolane provides the centralized marketing database and, based on a set of qualification criteria that Sophos has established, automatically determines what detail is shared with the new Salesforce.com platform.

"We were really pleased with the Salesforce.com integration offered. Using the latest Salesforce.com connector, Neolane ensured the transition from our legacy CRM environment to Salesforce.com was a smooth and seamless one. We were able to function in a hybrid environment for a short period of time, where Neolane interacted with both Salesforce.com and our legacy CRM solution without conflicts, and were able to get the Salesforce.com integration up and functioning very quickly," said Schlansky.

Neolane also supports Sophos' distributed global marketing teams. Neolane has become a development tool that is used to implement best practices for more effective campaign execution, tracking and measuring, and eventually to encourage more self-sufficient teams.

Lessons Learned: Security Must Align with Marketing Operations

"Marketing vendors simply can't underestimate

the value of security, and I'm not saying that just because of the business we're in. The ability to protect customer data and privacy is incredibly important given it is often the primary target of attacks," said Schlansky.

Sophos chose to take advantage of Neolane's highly secure Software-as-a-Service (SaaS) model, not only for the cost advantages it provided, but also because it was a low-risk approach to evaluating the effectiveness of the solution. In fact, Neolane was the first external vendor solution to be deployed in a SaaS model at Sophos. Neolane's ability to offer the option to move from a SaaS-based model to an in-house hosted model, should evolving business needs warrant this in the future, was also seen as a positive by Sophos.

Over time, Sophos plans to expand to other communications channels in addition to email. The company will also look to evolve its approach to lead scoring to continue to improve lead quality, while decreasing the amount of human intervention.

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