



# Trillium

## CASE STUDY



### The **Client**

Trillium Flow Technologies is a multinational designer, manufacturer, and aftermarket services provider of pumps and valves for oil, gas, power, water and wastewater. Built on a rich global history spanning hundreds of years, Trillium Flow Technologies™ fuels growth through innovation, an experienced workforce, and their company vision to become the most relied upon flow control solutions company in the world.

## The Problem

Trillium Flow approached Marketing Automation Canada (MAC) with a clear problem in mind. They needed to improve Marketing <> Sales collaboration in order to maximize their Sales funnel, and they knew that setting up a strong Marketo <> Salesforce integration, free from sync errors, would be key. That being said, their internal Marketing team was small, and had limited experience using marketing automation tools. They knew what they wanted their marketing automation platform to accomplish, but didn't know how to get there. They felt confident that teaming up with the experts at MAC would ensure the integration would go smoothly, and would give them some peace of mind.

In addition to the Marketo <> Salesforce integration, Trillium Flow needed support in setting up and optimizing the additional modules and integrations they had ready to add to their tech stack, including Marketo Sales Insights (MSI), Account Based Marketing (ABM), and Bizible.

To really hone in on the benefits of syncing their Marketing Automation Platform (MAP) with their Customer Relationship Management (CRM) system, they also needed to establish a thorough lead scoring model and accompanying lead lifecycle plan, in order to clearly and accurately communicate Sales Ready leads to the Sales team, to segment across regions, and to provide insights on their past engagements - to ultimately win more business.

Finally, the team knew they needed to become strong Marketo users to make the most of their MAP investment - so they needed training on the fundamentals so they could hit the ground running with Marketo.

## The Solution

With Trillium Flow's particular needs in mind, we put together a custom implementation plan, which focused on the architecture of the set up - ensuring that, not only were all the discussed aspects covered, but that they play nicely together (including Marketo, Salesforce, Bizible, Scoring Model, Lead Lifecycle, MSI, ABM).

Let's dive further into the integration with Salesforce. Our experts alongside the team at Trillium, worked to create a field assessment strategy. This is used to identify key metrics, insights, tasks, campaigns and custom fields on their Leads, Accounts, Opportunities, and Contact records inside of their CRM. From there, they went to work on the configuration to allow for a bi-directional sync of information between systems, with Salesforce (CRM) being the record of truth. This was key for the team at Trillium because not only did they identify key metrics earlier in the process but were now better equipped to create a robust scoring and lifecycle process geared towards their company specifications.

**It is always important to meet with your sales team and internal stakeholders when creating custom scoring because determining these key values greatly affects the quality of leads being funneled into the pipeline and eventually becoming SQL**

We created an advanced Lead Lifecycle and, by identifying the key personas and characteristics that make up the ideal lead for Trillium, we set up an accompanying scoring model which moves leads through the Lifecycle based on their engagement. Eventually, qualified leads would sync to Salesforce, and assign to appropriate sales reps using segmentation tactics. Relevant information would be shared with those reps using MSI, in order to help close deals!

## The **Solution** CON'T

MAC's custom implementation plan also included enhanced training for Trillium Flow's team, to ensure they were able to use the system confidently and independently after the initial set up. We also arranged weekly touchpoints to walk them through critical milestones of the implementation, and facilitate workshopping as needed.

Most importantly, we strategically developed lead scoring and nurture tactics to create a continuous flow of qualified leads for sales to target based on the personas that match up best for their business.

# The Outcome

With the success of the project, the team at Trillium was able to increase the flow of leads into their sales funnel while also providing the sales team with a higher level of detail for a more targeted follow up strategy. The Marketing team now had a robust and scalable scoring and lifecycle management program that could grow with the team and be refined further.

Trillium was able to showcase marketing efforts, lead conversion metrics and additional insights to leadership and stakeholders which allowed them to increase marketing budget and focus their attention on creating more meaningful marketing campaigns and collateral. There has also been a significant increase in engagement with emails, website, social media, webinars and events.

The thorough training plan we organized for the Trillium Flow team has led to quick platform adoption, allowing them to get the most out of their MAP investment, as quickly as possible.

By leveraging Bizible and MSI, the team has better visibility into the influence of each of the marketing campaigns, allowing them to better decide in the future how to most effectively invest their marketing spend.

Marketing Automation Canada continues to work with Trillium Flow, by developing a webinar series, a compliance management system, and additional MarTech integrations, to better strengthen the marketing strategy.

