

Marketing Automation
is a **journey**



Let us lead you
around the **world**



COMPANY OVERVIEW

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I. INTRODUCTION

DemandGen is a global consulting firm helping companies deploy and utilize marketing automation and CRM systems. We are the trusted advisor to the world's leading sales and marketing teams combining superior service, business process, and technology expertise. As a Marketing Automation production agency, DemandGen is the only consulting company worldwide that is 100% focused on lead management. Over the past three years, DemandGen has helped more than 150 clients—including leading global enterprises such as Concur, NetApp, Novell, Dell, AVID, American Express, Taleo, and Riverbed—harness the power of marketing automation.

Our focus: helping marketing organizations leverage the full potential of marketing automation and achieve extraordinary results.

Our execution: dependable, skillful, timely, effective, measurable.

Our objective is to deploy your Marketing Automation system and maximize your organization's utilization of it, to bring you the greatest possible return on your investment. Our services will enable you to:

- ❖ deploy the solution rapidly and successfully on a global scale
- ❖ integrate CRM systems for an end-to-end lead generation and management platform
- ❖ apply best practices to your use of marketing automation for best results
- ❖ improve the effectiveness of marketing campaigns, in both quality and quantity
- ❖ measure and report the ROI of your marketing initiatives

These goals will be met by:

- ❖ working closely with you to understand your marketing objectives, challenges, systems, processes, sales cycles, data sets, and reporting requirements
- ❖ mapping processes to the global Marketing Automation implementation, to enable a smooth transition in culture through strong governance, documentation, and leadership
- ❖ implementing the new system and processes on a global scale, including standards, templates, configuration, reports and dashboards, training, and documentation
- ❖ designing and executing campaigns that produce results: driving quality leads to sales and increasing customer lifetime value

II. ABOUT DEMANDGEN INTERNATIONAL

Founded in 2007, DemandGen International, Inc. is a global team of marketing automation and lead management experts, with centers of excellence across North America and Europe. Best known for its award-winning lead scoring and nurturing methodologies, DemandGen has helped hundreds of clients establish best practices, implement effective lead management programs, and produce measurable results. With unparalleled expertise in the industry, our staff harnesses the powers of art and technology to create highly personalized, incredibly effective experiences for your customers and prospects.

Key business indicators we use to measure our impact include the revenue growth of our clients, their longevity, the success of their promotions, the ability of their Marketing Teams to show contribution to revenue, and the awards and accolades our clients receive for their campaigns. Does our approach work? It's clear to us that it does. During the worst economic downturn the country has experienced, DemandGen clients have flourished and grown.

MANAGEMENT TEAM



David Lewis
Founder & CEO – Americas



Reinhard Janning
CEO - Europe



Norm Bellisario
Director of Professional & Creative Services



Mike Hancock
Director, Solutions Architecture



Patrice Greene
Director of Business Development



Erwin Arnold
CTO, Europe

COMPANY PROFILE

Founded:
2007

Employees:
60+

Type:
Private

Client Base:
150+ across the Americas, Europe, and Asia

Sample Enterprise Clients:

- | | |
|-----------|------------------|
| ❖ NetApp | ❖ Apple |
| ❖ Taleo | ❖ SuccessFactors |
| ❖ AVID | ❖ DuPont |
| ❖ Red Hat | ❖ Novell |

Certifications:

- | | |
|-------------|--------------|
| ❖ Eloqua | ❖ DemandBase |
| ❖ Oracle | ❖ Marketo |
| ❖ Microsoft | ❖ Salesforce |

Marketing Automation Awards:



- ❖ 2010 Eloqua Markie Winners
 - Marketing Visionary - Amit Varshneya, Hexaware
 - Most Creative Marketing Campaign - Taleo
 - Marketing and Sales Alignment – Polycom
 - Marketing Visionary - Daniel Greenberg, TrialPay
- ❖ 2010 Eloqua Markie Finalists
 - Marketing Center of Excellence - NetApp Inc.
 - Best Lead Nurturing Program - Taleo
 - Best Lead Scoring - NetApp Inc.
 - Getting to Know You Award - Adobe Systems Europe Ltd.
 - Marketing Visionary - Daniel Greenberg, TrialPay
- ❖ 2009 Dreamforce Addy Award – Sales Enablement (Client: Infoblox)
- ❖ 2009 Eloqua Markie Winner – Best Nurture (Client: Ellie Mae)
- ❖ 2009 Eloqua Markie Winner – Sales Impact (Client: Infoblox)
- ❖ 2009 Eloqua Markie Finalist – Lead Scoring (Client: Taleo)
- ❖ 2009 Eloqua Markie Finalist – Lead Scoring (Client: Bella Pictures)
- ❖ 2009 Eloqua Partner Award – Most New Clients
- ❖ 2008 Employee Management Association – Best Nurture (Client: Accela)
- ❖ 2008 Eloqua Markie Winner – Best Nurture (Client: Taleo)
- ❖ 2007 Eloqua Partner Awards – Highest Eloqua Customer Satisfaction

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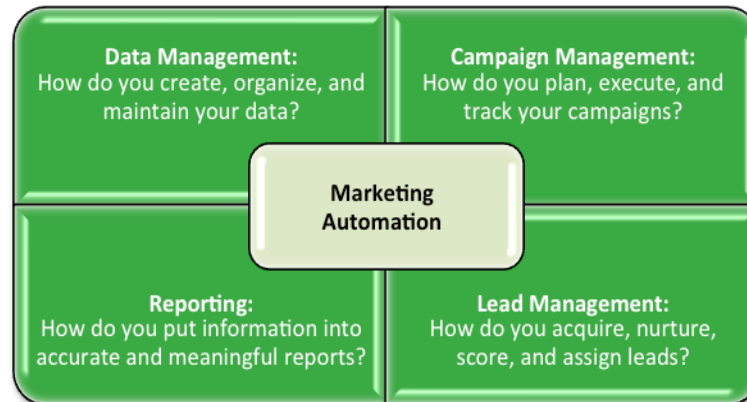


United Kingdom – London
Opening 2011

THE DEMANDGEN FRAMEWORK:

OUR APPROACH TO DEMAND GENERATION WITH MARKETING AUTOMATION

The DemandGen framework for marketing automation success with your lead management system defines key functions that must work together seamlessly to deliver significant results.



For each of these key functions, DemandGen has established best practices and a proven methodology. For example, as part of the Data Management function, we guide clients through a Data Integrity exercise to ensure that the data collected is both standardized and segmented. Likewise, Lead Management system design ranges from lead taxonomy to lead routing to lead scoring to sales efficiency.

Marketing automation is a relatively new and unstructured area, and each client's journey—like each company's sales and marketing process—is wholly unique. DemandGen focuses considerable time and energy on getting to know you and your business, so that we can make the best recommendations for your organization. We will be an extension of your Marketing Team, so that we'll be in lockstep with you to achieve your goals.

To develop our best practice strategy for achieving profound results with your marketing automation, DemandGen has worked with market research analysts, marketing automation providers, and scores of marketers—both automation novices and those who have experience with this cutting-edge technology. This considerable body of knowledge is the foundation upon which we help each client define and implement a successful marketing automation strategy: through which Marketing can efficiently acquire, qualify and assign leads throughout the Marketing funnel, and Sales can make valuable contributions to company revenue. The result? A steady pipeline of demand for the company's products or services easily tracked and reported.

CAPABILITIES AND EXPERIENCE

KEY PRACTICE AREAS

 Marketing Effectiveness	 Lead Management	 Campaign Management	 Reporting and Measurement	 Data Management
<ul style="list-style-type: none"> • Business process reviews • Marketing automation system selection • Mapping your marketing automation system to the overall marketing plan • Ongoing coaching and training 	<ul style="list-style-type: none"> • Establishing your demand waterfall • Defining your lead management process • Defining lead taxonomy • Lead scoring strategy, system design, and execution • Lead scoring rollout and sales training • Lead nurturing strategy, program design, and execution • Customer lifecycle campaign strategy, program design, and execution 	<ul style="list-style-type: none"> • Demand generation planning (funnel filling strategy) • Lead capture and routing • Email design and best practices • Landing page design, pre-population, and progressive profiling • Event marketing campaign design for invitations and reminders • Campaign design and production 	<ul style="list-style-type: none"> • CMO dashboards, marketing contribution to revenue • Lead source tracking and channel effectiveness • Closed-loop campaign reporting • Email and campaign reporting • Website analytics and reporting 	<ul style="list-style-type: none"> • Data cleansing and standardization • Data segmentation • Data appending



WINNING WITH MARKETING AUTOMATION

Winning with marketing automation only starts with proper systems integration and deployment. The success of your implementation ultimately depends on your Marketing Team's ability to fully leverage the power of the system and drive effective use of the it throughout your organization.

Unlike a classic systems integrator that focuses solely on deployment and configuration, DemandGen is a marketing automation powerhouse. While 95% of the day-to-day usage of marketing automation rests in the hands of the Marketing Team, 100% of the impact (ROI) is in driving revenue. Our single-minded focus and our expertise are centered on driving revenue through the use of marketing automation and CRM. DemandGen helps its clients expand their focus beyond the "campaign du jour" by identifying the holistic requirements of Marketing and Sales and mapping marketing automation to the business. Our cultural philosophy is to make the Marketing Teams we work with heroes: heroes for driving revenue, heroes for delivering a consistent flow of qualified leads to Sales, heroes for increasing output without additional resources.

A PASSION FOR LEAD SCORING

Our Lead Scoring Approach

DemandGen has a very detailed, well thought-out, and streamlined process for lead scoring, benefitting our clients by following a step-by-step, actionable plan from planning phase to launch. This award-winning approach has had a tremendous impact in driving revenue for our clients.

Kickoff

We kick off lead scoring by helping the client business owner identify key stakeholders within Sales and Marketing. It's vitally important to include resources throughout all departments (Field Marketing, Marketing Communications, Marketing and Sales Operations, Inside Sales, Field Sales, and Product Marketing) to ensure that the model is built with consideration of all parties that will be benefitting from, using, or contributing to lead scoring. It's important for everyone to understand the pieces that go into formulating and building a lead score model, as well as to buy into the benefits of adopting lead scoring.

Requirements Gathering

DemandGen will then educate the team on lead scoring by conducting an onsite workshop with the key stakeholders from the various departments. Throughout this one-day session we identify the qualification (or explicit) criteria that will be scored as part of the lead scoring system. Each piece of qualification criteria is weighted. During this workshop, we walk through a self calculating workbook to see in real-time how question and answer weighting will impact a lead's score and rating. Clients find this workshop and the tools we use to capture requirements extremely helpful.

DemandGen takes the guesswork out of scoring online behavior. Over our years of experience building lead scoring systems, our model has proven successful time and time again.

Systems Audit and Pilot



When the workbook is complete, DemandGen performs an audit on both Marketing Automation and the CRM system. This audit is very important, ensuring that the marketing automation and CRM systems are configured properly to accept the implementation of lead scoring.

Following completion of the audit, and any projects or work that result from it, DemandGen begins building the lead scoring system. Upon completion of building all components, DemandGen will run a pilot to allow the client to preview the rating distributions, in order to make modifications prior to going live and launching to the Sales Team.

Sales Training and Adoption

When the lead score system is ready to go live, DemandGen will come onsite and do a sales training to walk the Sales Team through how to use lead scoring, give an overview of what is being scored, show important reports and dashboards, and answer any questions.

Ongoing Maintenance

We have an ongoing relationship with all of our clients to make modifications over time to incorporate changes in the business and feedback from Sales. Lead scoring is a living program that should be consistently evaluated, refined, and updated over time.

Our Multi-Dimensional Lead Scoring Model

Our unique approach to lead scoring is extremely thorough and incorporates the following three dimensions:

First Dimension: Qualification Criteria

DemandGen has developed a proprietary system for assembling the qualification questions and their corresponding answers. This system enables us to apply weighting estimates to see in real-time the impact these weightings have on a lead's score. This proprietary simulator is a tremendous timesaver for determining the initial lead scoring model, and provides the ability to simulate future changes before any modifications are made.

This formula represents the way we calculate the qualification level of a lead, factoring in the questions, their weightings, the answers, and their weightings:

$$\text{Qualification} = (Q1 \text{ Weight}) * (Q1 \text{ A1 Answer Weight}) + (Q2 \text{ Weight}) * (Q2 \text{ A1 Answer Weight}) +++$$

Second Dimension: Measuring Interest

Marketing automation systems enable us to track the "digital body language" of our online prospects and customers; the ability to accurately measure their interest is a tremendous benefit to every Sales rep. The key to harnessing this power comes from applying a proven formula for measuring interest. DemandGen's interest formula has been proven to accurately measure a prospect's interest, and frees our clients from having to develop their own methods.

Our Interest model is extremely thorough and includes some of the following criteria:

- ❖ Web behavior (depth of visit, timeframe, frequency, and higher values for high value content)
- ❖ Forms (how many, particular forms, etc.)



- ❖ Email responsiveness
- ❖ Event participation (offline and online)
- ❖ Trigger-based rescoring when a new action is taken
- ❖ Decay scores based on inactivity

This formula represents how we calculate the interest level, utilizing these key variables:

$$\text{Interest} = (\text{Website Visit Frequency}) + (\text{Specific Website Page Behavior}) + (\text{Form Behavior}) + (\text{Campaign Responsiveness}) + (\text{Event Activity}) - (\text{Website Inactivity}) - (\text{Negative Website Page Behavior}) - (\text{Campaign Inactivity})$$

Third Dimension: Calculating and Displaying the Overall Rating

By plotting the first two dimensions on a nine-quadrant grid, the overall lead rating is determined. Classic ratings can range from A – E, but DemandGen has also applied variations to the model leveraging the SiriusDecisions Lead Ranking System and custom models, each of which enable Sales managers to set the corresponding service level agreement for each rating.

Even if you apply the best lead scoring models, the system is only successful if it displays this information to Sales in a format that is immediately visible and understandable. To achieve this success, DemandGen developed a proprietary CRM user interface and corresponding dashboards to effectively present the lead scores.

Award-Winning Impact

The above process and model have resulted in not only in awards and recognition but more importantly significant revenue impact. Our clients will attest that this process and model—and all that they encompass—are two of the key reasons that they benefit from working with DemandGen.



INTEGRATION EXPERTISE

DemandGen is a Salesforce.com certified agency with a great deal of customer relationship management expertise. We have significant experience in deploying and customizing Salesforce.com systems using Salesforce.com best practices, gained through our engagement in such projects worldwide.

In addition to Salesforce.com, DemandGen works with the following systems:

- ❖ Oracle
- ❖ Microsoft CRM (On Premise or On Demand)
- ❖ Saleslogix
- ❖ Proprietary or home-grown CRM systems
- ❖ Third-party proprietary databases (call center, external marketing datamart, SQL)

III. OUR CLIENTS

More than any other marketing automation consulting firm worldwide, DemandGen is best positioned to recommend marketing automation best practices, based on our unique knowledge of the demand generation platform combined with the countless successful implementations we have executed and the effective lead scoring/lead nurturing systems we have architected.

DemandGen has had the honor of working with more than 150+ clients worldwide: here are some of them.

Accela	Fairchild Semiconductor	Plum Benefits
Accelrys	Fidelity Investments	PMI Mortgage Insurance Company
Aeroscout	G2IX	Polycom
Affymetrix	Gain Capital	Primex
Altium, Inc.	GuardianEdge	Proofpoint
American Express	Hexaware	QNX
Apple	iLinc Communications	Quova, Inc.
BEA Systems, Inc.	Ilumina	RadiSys Corporation
Bella Pictures	Infoblox	Red Hat
Brightcove, Inc.	Informatica	Replicon
Booz Allen	Innotas	Reval.com
Bumblebee Marketing - Cisco	InsideView	Riverbed
Callwave	InterVoice	Robert Schwartz
Cast Iron Systems, Inc.	IOCOM	Rosetta Stone
Catapult	ISO	Sage
Cisco	JDA Software	ShoreTel
Citrix Systems	Kace/Dell	Software AG
Clickability	Key Technologies	Strikeiron
CodeGear	LogLogic	Stylesight
Concur Technologies, Inc.	LucidEra	SuccessFactors
Cramer OnLine	MarketTools, Inc.	SunGard
CT Summation	Mashery, Inc.	Symphony Services
Dell	Mincom	Symyx
Dice.com	Montgomery & Co., LLC	Taleo
DigiDesign (Avid)	Mortgage Coach	TIAA CREF
DocMagic, Inc.	Mulesoft	TrialPay
Dupont	National CineMedia	TriNet
e.Republic, Inc.	NetApp	Uptime Software
E2Open	Netezza	Vaisala
eEye	NetPro	Verisign
ElectricCloud	Neuberger Berman Group LLC	Vistage
Ellie Mae	Ninth House	Webtrends
Eloqua, Inc.	Novell	Wolters Kluwer
Endeca Technologies, Inc.	ON24, Inc.	Workday
Environmental Support Solutions, Inc.	Operative	Xtralis
Equinix	Parature	YouSendIT
Exagrid	Pedowitz Group	Zenprise
Fair Isaac	Pillar Data Systems	Zilliant, Inc.



CLIENT EXPERIENCE

DemandGen seeks to engage with clients with whom we can build trusted long-term partnerships. In order for DemandGen to provide the best possible consulting services around marketing automation, we find it's imperative for us to invest time and effort to become an extension of our clients' marketing teams. The vast majority of our clients engage in long-term relationships with us; several have been with us since our company's inception. While we have on occasion had briefer project-based client engagements, our most notable client success stories stem from our long-term clients. Here are a few examples.

Polycom

When Polycom—the worldwide leader in unified communication and video conferencing—purchased Eloqua in the beginning of 2009, the company engaged DemandGen to help with worldwide deployment. We worked extensively with Jennifer Pockell-Wilson, Senior Director of Global Marketing Operations, to plan out global deployment, which included defining Polycom's marketing automation processes, lead taxonomy, governance for organization and utilization of the system, lead scoring and nurturing programs and training curriculum. DemandGen worked with Polycom to develop a custom training curriculum to build the marketing automation skills of team members in each geographical location. The curriculum provided in-depth training on the exact process for setting up and deploying campaigns, as well as on how to use Eloqua to launch and deploy Polycom's campaigns. DemandGen also assisted with standardizing the lead taxonomy, created email and landing page templates, and provided best practice consulting on effective use of campaign dashboards and reports. In addition to deployment work, DemandGen also worked with Polycom to utilize the Eloqua Event Module and the design of several lead nurture programs. Today, DemandGen continues to move Polycom along the journey of marketing automation adoption and is assisting Polycom on a global basis.

Red Hat

Red Hat, the world's leading open source technology provider, engaged DemandGen to help in migrating the company's marketing team from a legacy marketing automation solution to Eloqua. DemandGen worked with Red Hat to review the current state environment and build a plan to migrate all assets and activities from the former system to the new Eloqua database. DemandGen developed a migration plan in conjunction with rolling out Eloqua across the global organization. In addition, Red Hat's marketing team had a 17-city road show tour to promote, throughout the period of this transition. DemandGen was able to manage the marketing efforts in Eloqua for that road show (emails, forms, landing pages, responses, attendance, etc.) while simultaneously deploying the larger solution across the organization, enabling the marketing team to promote the tour and register attendees without any impact during the transition. Currently, DemandGen is working with Red Hat to finalize a new, more robust lead scoring system to be built in Eloqua, replacing the process the team used before purchasing Eloqua. We're also building a custom ROI reporting solution to ensure that Marketing is leveraging Eloqua more fully to report on its contribution to revenue.

Taleo

For the past two years, we've been instrumental in helping Taleo, Inc. with the design, implementation, auditing, and updating of their lead scoring system. The system we designed landed Taleo as a finalist this year at the Eloqua Markie awards: an international marketing contest recognizing outstanding performance in various marketing automation categories. The system we implemented for Taleo leverages the SiriusDecisions buying cycle and demand waterfall models, and we extended the lead scoring system to combine a sophisticated set of lead nurturing programs that routed leads to various nurtures based on a lead's score. Incorporating both interest measurement and qualification, leads are scored, ranked, and routed to the appropriate Sales rep for follow-up.



Proofpoint

This past year we were engaged by Proofpoint to overhaul the company's previous lead scoring system. The old system was not adopted by Sales for two main reasons. The first reason was that the old lead scoring model was not multi-dimensional and was based solely on qualification criteria; the new model we implemented used our unique approach to measuring a lead's interest in combination with lead qualification. The second reason was that the implementation in the CRM (Salesforce) was not giving Sales immediate visual indication of the lead's score (all too often, lead scoring is implemented with just a numeric lead score field). Our approach dramatically improved the implementation by incorporating graphical indicators and gauges for each lead, which allowed immediate visibility to the score much like a five-star movie rating or temperature gauge provides instant indication of ranking or level.

Infoblox

Infoblox engaged us to implement an interest-only lead scoring system—and the system we built helped get Infoblox on stage at Dreamforce to receive a finalist award in the category for sales enablement. The recognition was largely due to the impact that lead scoring had on sales pipeline management. The system we designed integrated the lead score to opportunities created by the Sales rep in the CRM, and then mathematically predicted the expected close date and probability of closure based on the lead score and historical data.

Bella Pictures

Bella Pictures is in the business of matching a bride-to-be and a wedding photographer. Given the lengthy buying cycle for a bride—which averages a year—lead scoring plays a critical role in aiding Sales as to the right time to engage with the lead. Too early, and the lead is not ready to contract with a photographer. Wait too long, and the bride will have already contracted with a local photographer based on a referral. Because lead scoring can have tremendous significance in identifying the precise timing for a rep to actively engage a lead, we used extensive historical data analysis on buyer demographics to determine the key qualification criteria and interest behavior. From this information, the system scores leads and alerts Sales to contact the lead. The system was so successful in impacting revenue that Bella was a finalist in the 2009 Eloqua Markie awards for lead scoring.

Vistage International

Vistage International is a peer network that provides intensive coaching programs for CEOs and senior executives. Because the service is so appealing to both qualified and unqualified candidates, Vistage's marketing programs typically generate a large number of unqualified leads. This situation was resulting in huge amounts of wasted time on the part of salespeople who were attempting to contact unqualified leads and qualify them: in short, it had a major negative impact on sales efficiency. To improve the situation, Vistage engaged DemandGen to design and implement a lead scoring system that would systematically rank leads before they got to Sales. The results of the program have been excellent. In the worst economic times in recent history, Vistage's business grew significantly in 2009 largely due to the efficiency lead scoring provided to Sales. Rather than waste time on unqualified leads, Sales was laser-focused on the right candidates. Our on-site workshop and lead scoring consulting were instrumental to the success of the program.

NetApp

NetApp, a leading provider of storage and data management solutions, purchased Eloqua in January 2009. Since that time DemandGen has helped NetApp carefully plan and execute its adoption and global deployment. Over the past year DemandGen's relationship with NetApp has expanded dramatically, with DemandGen becoming a virtual extension of NetApp's global marketing team. This partnership required major commitment from DemandGen to hire resources, learn



NetApp processes, and support the company's global marketing operations. Starting in mid-2010 DemandGen successfully staffed a worldwide team including Asia, Europe, and the Americas to handle day-to-day campaign production activities for NetApp. In any given month, this team and staff supports 150 or more campaigns in a dozen different languages. In addition to campaign production work, DemandGen works with NetApp on special projects including lead scoring, nurturing, data governance, progressive profiling, systems integration with third-party systems such as Demandbase, Omniture, Clickability, and others. In 2011 DemandGen has been a key resource to reengineer NetApp's CRM, helping with integration, redeployment, and migration of NetApp's CRM to Salesforce.com DemandGen's relationship has been very successful, not only from a project and collaborative perspective, but from the perspective of marketing effectiveness as well: NetApp is a finalist in Eloqua's Markie Awards for both Lead Scoring and Marketing Center of Excellence.

TALEO

With DemandGen's help, Doug and the team over at Taleo have built an award-winning series of automated nurture, lead scoring, and sales routing programs. Fully integrated with CRM, nurture and routing programs run automatically based on lead status and score. Progressive profiling and dynamic forms are used to increase effectiveness and gather important data for ongoing scoring, re-scoring and targeted marketing. Taleo is an excellent example of how our two companies have partnered and worked together to create award-winning work which has produced results for the Taleo organization.

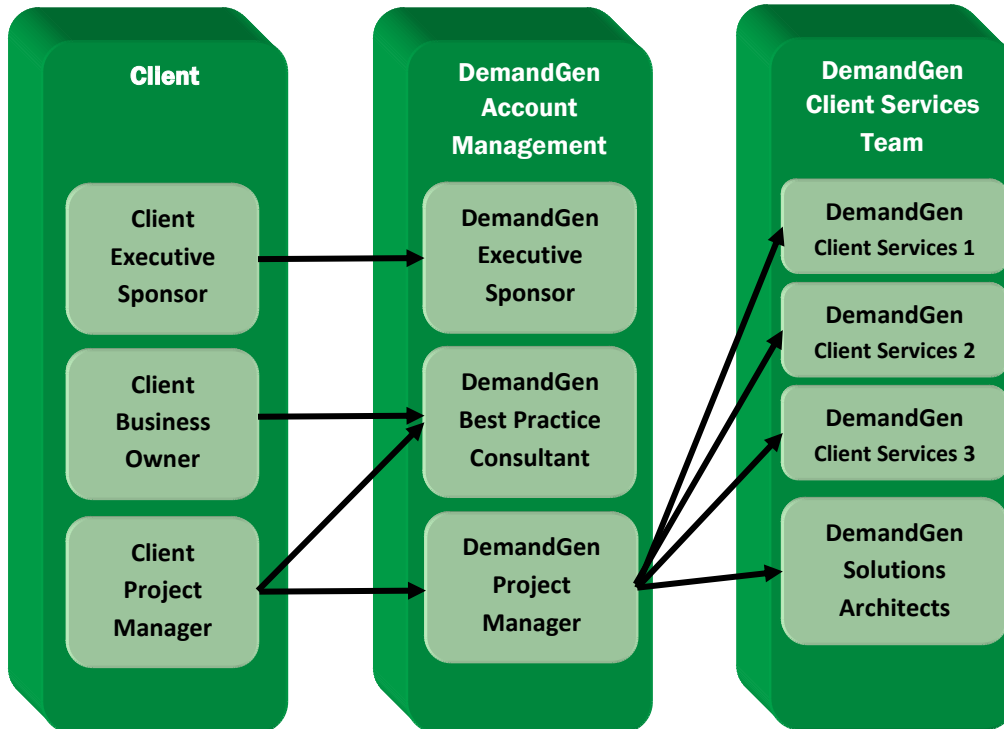
CONCUR

DemandGen has brought its expertise to support Concur's endeavors in marketing automation. In addition to systems integration and many responsibilities around handling day-to-day email requirements and administering Concur's Eloqua system, DemandGen has provided deep strategic expertise in lead management. Our consultants have played integral roles in Sales and Marketing alignment at Concur, guiding the company to define lead taxonomy and the demand waterfall as well as to develop lead strategies. We have also been instrumental in helping Concur to begin to exploit the power of Eloqua for lead nurturing, building a free trial nurture campaign for the company and developing all the relevant content for the campaign, including the "lead bait" assets.

IV. ACCOUNT TEAM

ACCOUNT TEAM STRUCTURE

In order to help clients achieve their goals, DemandGen will assemble a top-flight account team with a dedicated account manager to perform the activities outlined above. The team structure will be as follows:



PROJECT MANAGEMENT METHODOLOGY

DemandGen's Professional Services Team incorporates industry best practices for project management.



This methodology has a proven track record of efficient global application rollouts married with industry leading expert guidance on change management and marketing best practices. Global implementations are categorized by the following phases:

- ❖ Initiation: Discovery and Draft Implementation Scope
- ❖ Planning: Business Process Review of Current State
- ❖ Planning: Future State Design and Documentation
- ❖ Planning: Final Global Implementation Plan
- ❖ Execution/Control: Corporate Global Standards and Best Practice Templates
- ❖ Execution/Control: Prime Region Training and Deployment
- ❖ Execution/Control: Sequential or Staged Training and Deployment of Remaining Regions
- ❖ Closing: Project Completion, Review, and Turnover



CUSTOMER SERVICE AND SUPPORT

DemandGen's model for customer service and support:

- ❖ Your Account Manager will be responsible for strategy, onsite meetings, and managing the Client Services Team.
- ❖ Client Service personnel will perform work as outlined, and will funnel questions either to your Account Manager or to a designated client stakeholder—depending on project complexity or your preference.

On complex projects, status updates will be provided. Status can also be updated via email, phone, or in person if required to meet the needs of the project.

DemandGen has the proven ability to respond quickly and prioritize accordingly to handle 'crunch' situations where standard turnaround times do not apply. DemandGen is dedicated to helping to set production standards and processes that will meet the needs of our clients.

Expertise

Each of DemandGen's core project managers have more than four years of in-depth marketing automation experience, managing multiple high impact projects at a given time. Several of them have worked on staff at Eloqua Corporation, bringing priceless specialty knowledge to your projects. Projects include deployment, email campaign execution, lead scoring, lead nurturing, forms and landing pages, and campaign ROI tracking. The combined project management team has worked with over 150 clients worldwide and completed more than 5,000 projects.

Moreover, your account team is backed by a host of expert resources including subject matter experts, CRM experts, lead scoring and nurturing architects, email/landing page designers, content developers, API and product developers and more. You will always have access to the expertise you need.

Staffing

DemandGen has been very fortunate to experience relatively little turnover since the inception of our company. We understand, however, that people can decide to move on, and therefore we've built an infrastructure that creates a balance of ensuring consistent account management for the client with internal knowledge transfer for the team. It is important that our clients feel that their DemandGen team has invested time and effort into becoming an extension of their own marketing teams. Our internal professional services process facilitates regular debriefings on accounts, and our rotating team of back-end resources allows for seamless flow of information, should any team member leave DemandGen for any reason.

Compliance

DemandGen is fully cognizant that regulatory standards, branding, corporate governance, and other compliance factors are integral to marketing operations, and we will work with your team to ensure compliance with all applicable requirements.

V. MARKETING AUTOMATION DEPLOYMENT AND ADOPTION

GOALS

Our objective with new clients is to deploy your marketing automation system and maximize your organization's utilization of it, to bring you the greatest possible return on your investment. We will do this by:

- ❖ providing technical and best practice expertise to implement and customize your Marketing Automation solution
- ❖ collaborating with other teams to integrate third-party systems and processes
- ❖ developing your unique lead scoring process (if applicable)
- ❖ providing strategic guidance and expertise on developing lead nurturing programs and campaigns
- ❖ developing reports and dashboards to demonstrate and track your return on investment, as well as for daily operations
- ❖ providing training, documentation, customer service, and support for your implementation and beyond

CLIENT ENGAGEMENT

SUMMARY

We meet the needs of our clients by acting as an extension of the Marketing Team to provide a wide range of deep marketing automation expertise. A dedicated Account Manager and dedicated resources will manage the organization's implementation planning and active deployment, including development of the lead scoring system. We will provide additional resources with subject matter expertise to meet additional needs such as HTML programming, JavaScript development, project management, content development, CRM customizations and reporting, and strategic consulting. We will also be available to provide ongoing program and campaign management, ensuring clean data, delivering strategic and tactical recommendations, and executing campaigns, and we will scale those resources based on campaign volume.

PHASE 1: ONBOARDING

To be successful, DemandGen invests serious time and effort in your business to become a true extension of your team. Our Client Services Team will immerse in your organization's business (typically accomplished through a combination of onsite and offsite meetings), diving into all of the areas that are relevant to this project's scope as well as your marketing operations. This onboarding period will focus on the following:

- ❖ **Business Process Review:** obtaining a high level understanding of the functions of Marketing and Sales within your organization
- ❖ **Existing Lead Management Process Review:** understanding demand generation team's role, systems for lead management, and marketing and sales alignment
- ❖ **Marketing Operations Across the Globe:** learn how your firm handles marketing interactions across different regions
- ❖ **Email Marketing:** understanding the current campaign calendar and content library, identifying areas in which templates could be utilized, aligning with agency resources to ensure email best practices



PHASE 2: CHANGE MANAGEMENT AND PROCESS MAPPING

It is imperative that a well thought out change management process be designed to enable a smooth transition in culture through strong governance, documentation and leadership. Effective change management is key to managing the impact of implementing a global marketing automation system.

Following the Business Process Review, the DemandGen Services team will facilitate design sessions to map current process architecture to the future state. Fundamental marketing best practices are released to the core team through focused workshops throughout the duration of the implementation.

Topics can include:

- ❖ Conducting best practice workshops:
 - Develop a Resource Assessment and overall training plan across regions
 - Facilitate the creation of data governance policies and procedures
 - Creating best practice email and form templates
 - Creating global best practice workflows for lead nurturing
- ❖ Developing a lead scoring strategy and facilitating definition discussions for global/regional implementation
- ❖ Designing integrations to legacy systems such as third-party systems, data warehouse, subscription management
- ❖ Lead management consulting and integration with Salesforce.com, determining what custom work needs to be done on the CRM side to integrate list pulls with your marketing automation system.

PHASE 3: GLOBAL IMPLEMENTATION

DemandGen will work with you to map findings and recommendations to current scope, identify priorities, perform a gap analysis, and build a detailed project plan highlighting task ownership, timelines, and final agreed upon scope.

Global Configuration

We will establish global standards and best practice templates within the application, leveraging industry best practices and enforcing standardization through functional capabilities. Typical areas of configuration during this stage are:

- ❖ Lead Management module
- ❖ Sales Insight module
- ❖ Global email and landing page templates
- ❖ Data model and CRM integration
- ❖ Lead nurturing templates
- ❖ Standard reports and dashboards
- ❖ Website integration
- ❖ Global Subscription Management Center (if applicable)

Customizations for Primary Region and Subsequent Regions

Typically, the primary region is the most complex and culturally influential region. Each deployment phase begins with a localized BPR to identify custom processes that are unique to the region. Custom templates for regional requirements are configured and then leveraged as part of the training and adoption plan. For each region we will configure custom templates per regional requirements, which may include:

- ❖ Lead scoring program(s)
- ❖ Email templates



- ❖ Landing page templates
- ❖ Reports and dashboards

PHASE 4: PROJECT COMPLETION AND HAND-OFF

Once all regions have been trained, services delivered, and documentation compiled, DemandGen team works with the customer team to facilitate a final hand-off to the owners/administrators of the application all process related and configuration-specific documentation built. In addition, it's a final opportunity to wrap up any remaining items in the service agreement including a final review against the success criteria set at the beginning of the project.

PHASE 5: QUARTERLY PLANNING/REVIEW, ONGOING PROJECTS

In addition to your account team, you will have access to additional DemandGen consultants to assist in planning and strategy sessions periodically throughout the year. These sessions will be focused around the following areas:

- ❖ Reviewing the marketing calendar, upcoming initiatives, and goals/objectives
- ❖ Outlining and planning upcoming strategic projects as they relate to marketing automation
- ❖ Providing best practice consulting around lead nurturing, lead scoring, and additional lead management initiatives
- ❖ Providing project services as needed

DemandGen will assist you by recommending/developing solutions that stay within budget and timeline requirements. Your account manager will be responsible for ongoing communication, status updates, and progress on projects.

VI. CONCLUDING THOUGHTS

This is an exciting time to be a marketer. Marketing automation gives the Marketing Team real tools to demonstrate our contribution to the firm—to drive revenue, to drive results, and to grow our businesses. At the same time, this powerful technology brings with it additional responsibilities and new demands.

At DemandGen, we understand how to help you handle all these factors for your greatest benefit, because that is the entire focus of our company: ***leveraging the full potential of marketing automation to help you achieve extraordinary results.***

We sincerely thank you for the opportunity to present this proposal, and look forward to bringing you the greatest possible return on your investment in Marketing Automation : increasing productivity, improving performance, driving quality leads to sales, and increasing the lifetime value of your customers.