

# Master your Account Hierarchies, Master your Go-to-Market Efforts

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## Solving the B2B Data Mess with Leadspace Account Mastering

Many companies deal with messy data that makes it hard for sales and marketing teams to do their jobs effectively. Even teams with the best tools often find the customer data available in their CRMs or MAPs isn't much better than that found in the messy stack of business cards they once kept in their desk drawer—flat, one-dimensional, and out of date.

Today's go-to-market teams must have access to a **single source of truth for account intelligence**, with profiles that tie together *all* relevant data points, helping you visualize every site location, each account's parent/child relationship, and where your contacts work. Beyond having complete information, these profiles must be able to evolve over time in sync with the customer journey and as real-world changes unfold, such as companies restructuring or going through transaction events or individuals moving companies or teams or taking on new roles.





### **Account hierarchy information**

that goes beyond financial and legal structure to make connections between entities and identify key buying teams and decision-makers.



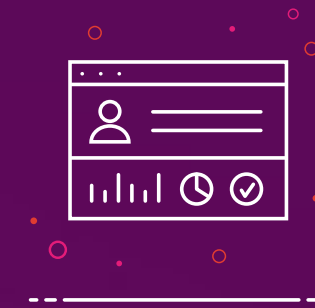
### **Clean, reliable data**

from which to conduct accurate territory planning, account assignment, lead routing, and TAM analysis.



### **A single source of truth**

that unifies data from ALL sources (including 1st and 3rd party) to ensure teams are working from the same page.



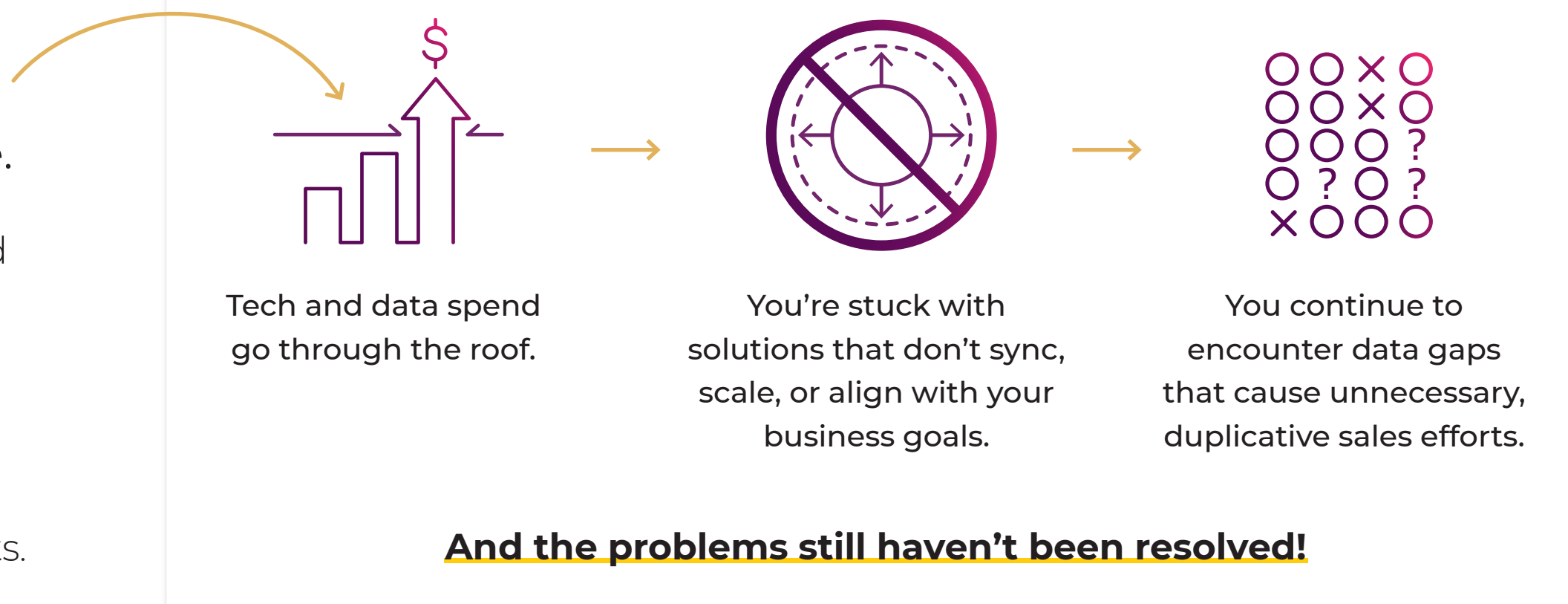
### **A view of customers and accounts**

that is structured and maintained according to your specific logic to align with the way you do business.

## **What Go-to-Market Teams Need**

Customer data quality is a difficult challenge to tackle.

Many organizations have looked to data vendors, point solutions, or DIY data lakes in attempts to try to solve the problem created by having so many users and contributors to customer data sets.



## What if you could approach customer data quality in a NEW way?

How would your strategy change if you went beyond enriching the data to operating from a **single source of truth** with a comprehensive view of customers and accounts that is unique to the way you work?

# The Solution: **Leadspace Account Mastering**



## Unified Master Profiles

You get access to master, global account profiles that are unified across multiple sources. These profiles are fresh, up-to-date, and complete, generated with a blend of data from 3rd party sources (including vendors you might already license) and your own 1st party data from other systems. There's also the option to incorporate custom logic that is unique to your business, such as specific account size, account location, etc.



## Foundation for Intelligence

With account master profiles you can continue unlocking even more value in your data, adding predictive scoring, intent signals, lead-to-account matching, and more. Improve your ABM efforts, outbound targeting, personalization, prioritization, and nurturing with a deeper understanding of your target accounts.



## Sync Across Systems

Your master profiles are synced and available in your CRM, with ongoing updates, to directly power your workflows. These profiles are synced across other systems too, to create alignment across teams with a 360-degree view that drives customer engagement with living, breathing data.



# Case in Point: Silicon Valley Tech Firm Achieves Sales Lift and Speeds Go-to-Market Execution with Account Mastering

A Silicon Valley company that provides intelligent customer engagement software to enterprises had the ambitious goal of a digital transformation. They wanted to refine their data management processes and automate lead enrichment, lead routing, and territory planning. To accomplish this they first needed a strong foundation from which to build a more targeted, AI-driven approach to sales and marketing.

## BEFORE LEADSPACE

### Messy Data Management

Different teams around the globe were using different data vendors to categorize accounts based on attributes such as size and location. Because the teams were pulling information from disparate sources, there was confusion and misalignment on territories and how accounts were classified and assigned. No one was able to get a single, comprehensive view of the firm's total addressable market (TAM).

## AFTER LEADSPACE

### Data Unification

Because Leadspace is data agnostic, we were able to **bridge gaps in the firm's database** by integrating seven to eight different data sources and layering that with Leadspace embedded data and the firm's own business logic. This enabled classification of accounts by size and location, according to the firm's specific company size definitions and global and regional team needs. In addition, **Leadspace helped the firm build a unified, "living" TAM** (from roughly 900,000 distinct accounts as well as new "discovery" accounts) that can be updated on-demand to incorporate new relevant data points as they become available.



## BEFORE LEADSPACE

### Manual, Inaccurate Lead Routing

The marketing ops team was relying on a high-touch process to qualify inbound leads before passing them off to sales. The SDR call center had to put in a ton of research and time on the phone to validate the leads and the sales team was frustrated because this whole process was taking up to 36 hours. In addition, once the leads finally reached sales, they often had to be rerouted to another rep or team because of incorrect account assignments.

## AFTER LEADSPACE

### Automated, Accurate Lead Routing

Leadspace enabled the firm to automate this process, **reducing the routing time from 36 hours to just minutes.** As soon as a lead comes into their system, it's now automatically enriched, scored, assigned to the correct account, and then routed accordingly to the right team in the right location around the globe using the firm's custom business logic.



## Everyone Wins!

This transformation allowed the firm to break down data and team silos around the globe. The marketing ops and SDR teams are happy because the qualification process is running smoothly without manual interference, the sales team is happy because reps are receiving the right leads within minutes and can access net new accounts within their territories, and customers are happy because they are being engaged by the appropriate person in a timely manner.

### LEADSPACE ACCOUNT MASTERING HELPED THE TECH FIRM:



- **Focus sales efforts on 5x higher converting MQLs** with fast, accurate routing plus additional scoring and insight on leads and accounts



- **Reduce time spent (from 36 hours to minutes)** resolving routing issues and assignment disputes



- **Save money and resources** previously spent on point solutions and manual work

Interested in learning more about  
Account Mastering with Leadspace?

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