

# SCALE

## **Pipeline Council**

Pipeline Generation - best practice to generating  
pipeline in an evolving market

# Today's Marketing Council leaders



**Lisa Horner**

SVP Marketing

AppFolio



**Kristina McMillan**

Founder

Argyle Earth



**Maria Pergolino**

CMO Executive-in-Residence

Scale Venture Partners

**We help our portfolio  
build and optimize  
hyper-growth GTM  
machines**

# Advisory

Been-to-Market Expertise



Advising our portfolio  
companies with bespoke  
GTM consulting

# Content

Step by Step Guides



Distilling decades of  
experience into concise  
GTM playbooks

# Events

The Power of Community



Connecting our network  
of EIRs, Exec Advisors  
and portfolio execs



# Today's Agenda



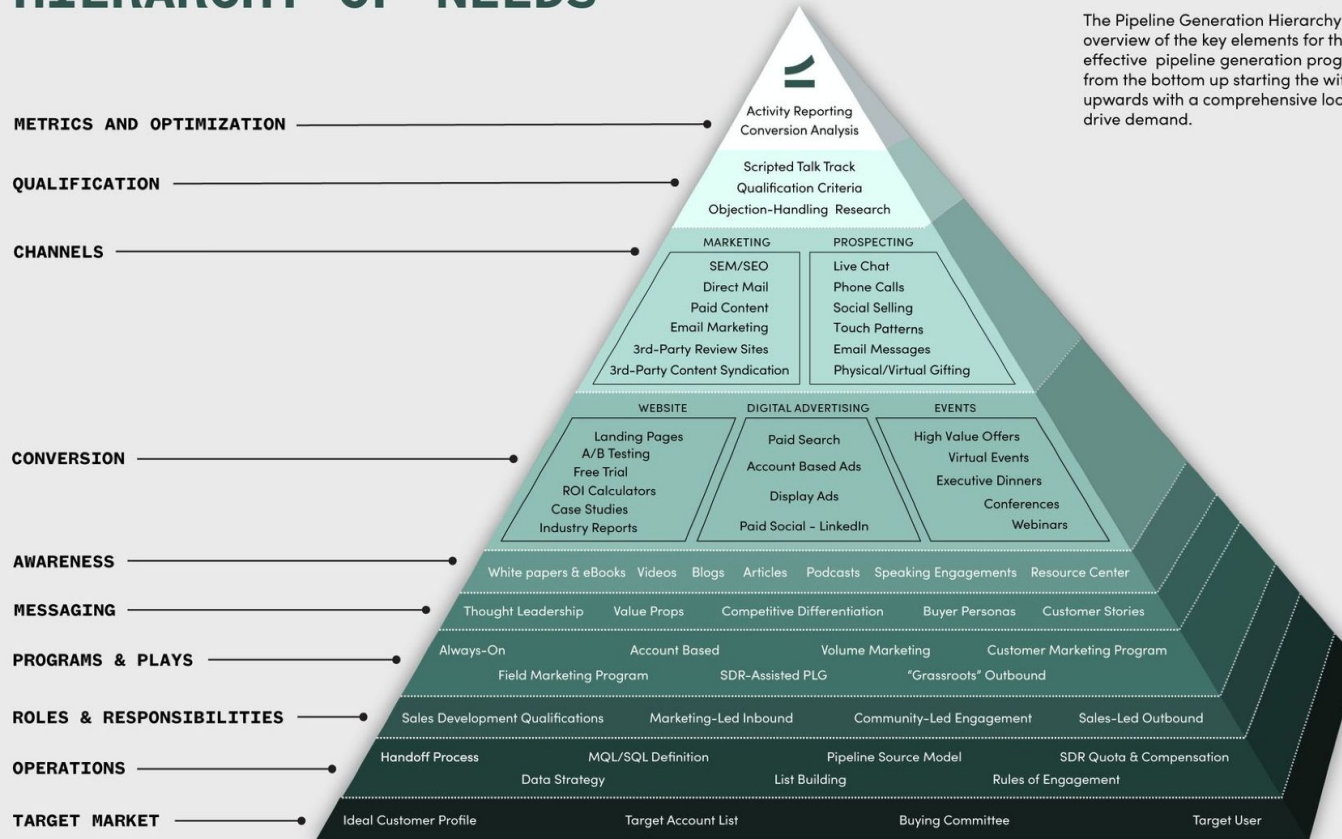
1. Introductions
2. Scale Pipeline Hierarchy
3. AppFolio Deep Dive
4. Discussion
5. Debrief

# Introductions

1. Name
2. Role
3. Organization
4. “Hot Button” Issue

# PIPELINE GENERATION HIERARCHY OF NEEDS

# SCALE



The Pipeline Generation Hierarchy of Needs provides a detailed overview of the key elements for the design and execution of an effective pipeline generation program. The elements are assembled from the bottom up starting the with target market and progress upwards with a comprehensive look at all the elements required to drive demand.

# SCALE

# Deep Dive: Appfolio



QUICK FACTS

appfolio

## **Vertical B2B SaaS**

REAL ESTATE, PROPERTY + INVESTMENT MANAGEMENT

## **Founded 2006**

PUBLIC COMPANY, I STARTED AT 75 EMPLOYEES PRE IPO

## **Property Management Software**

RUNS ENTIRE BUSINESS

## **B2B direct sales route to market**

SOME PLG GROWTH

## **Started in SMB**

STILL GROWING UP-MARKET

## **Competitors 35+ years old**

UNSEATING THE COMPETITION

## **Resilient industry**

VALUE PROP REMAINS STRONG IN DOWNTURN



# Four Pillars of Marketing

01

Our Brand  
Experience is a  
Differentiator

02

Excite New  
Customers to  
Choose

03

Excite Current  
Customers to Stay,  
Grow, ❤️, & Advocate

04

Automate,  
Underpin, & Scale  
Growth

# Delivering a *differentiated* brand experience as we acquire, grow, & retain our customers



**We have heard, that  
achieving pipeline  
targets is like winning  
the lottery. True?**

# Your Customers:

# What Value Do Your Customers Need Now?

1. Do you understand the value you are creating for your customers?
2. Have your customer problems changed?
3. Do the GTM teams have enough real-time insights as to why you are losing deals?
4. Why are you winning deals?
5. What is happening with retention & churn?
6. Is everyone singing the same customer value song?
7. Have you reviewed the Sales pitch deck lately?

What's the biggest issue?

# It is easy to talk about what *you* do.

But your customer does not really care what you do, they care about the outcomes that you can create for them.

Why & how do you solve it better?

Are you validating with your customers & using their voices of success to tell your story?



Realm-x: Flows



**Don't get wrapped up  
in what you do -  
deliver value to your  
customers.**



# What Value Do Your Customers Need Now?

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4. Why are you winning deals?
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6. Is everyone singing the same customer value song?
7. Have you reviewed the Sales pitch deck lately?

# The Model:

# How are you performing against the model?

1. Did you build a comprehensive model(s) to drive the P/L?
2. Do you have real-time insights into what is not performing in the model(s)?
3. If you are way off, do you stop and adjust?

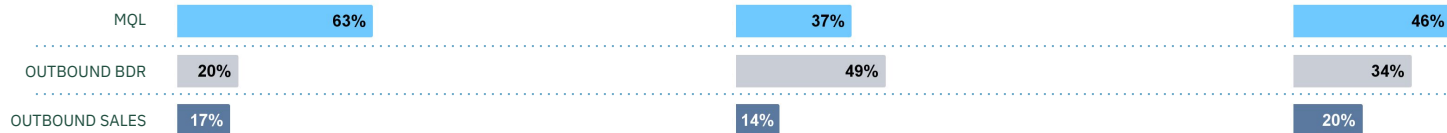
**Without pointing  
fingers, can the  
go-to-market teams  
see what is not  
working vs. plan?**

# Customer Acquisition Demand Model

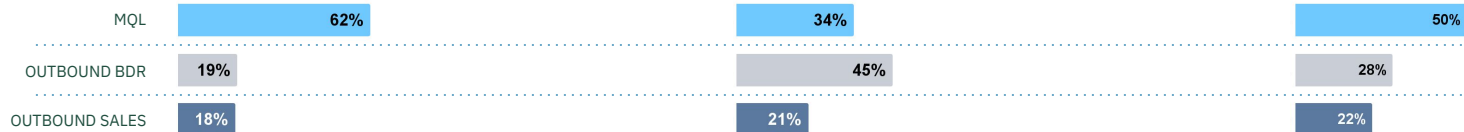
DOWNMARKET

UPMARKET

PIPELINE



WON



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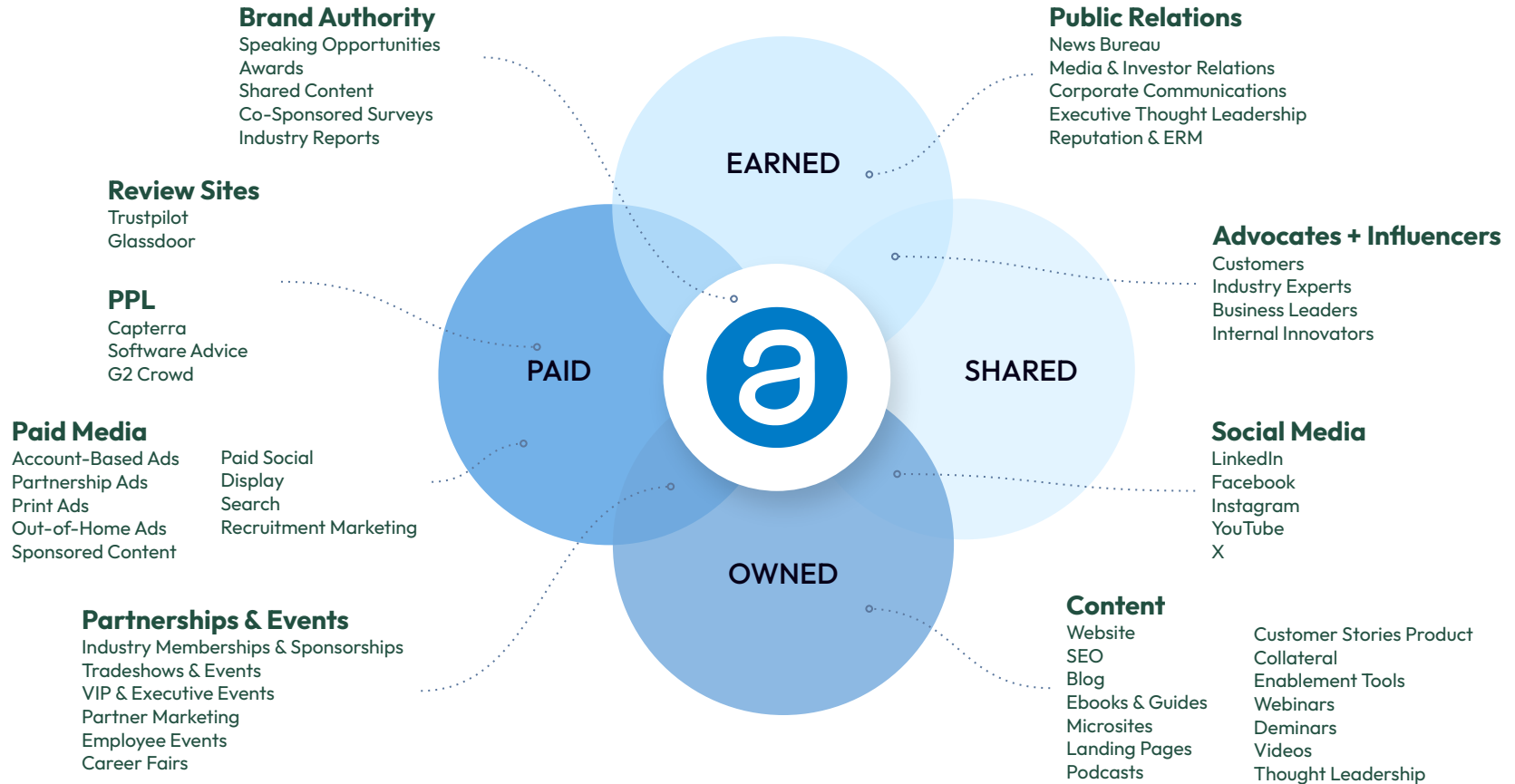
# Addressing The Gap:

# Once you find the gap, can the GTM teams align on top investment & activity shifts?

1. Everything comes down to capital allocation - can the go-to-market teams make smart adjustments midstream?
2. Are specific segments/audiences performing better than others?  
Products?
3. What pipe source is not achieving plan, and if it's Marketing, what program/channel(s) is not achieving plan?

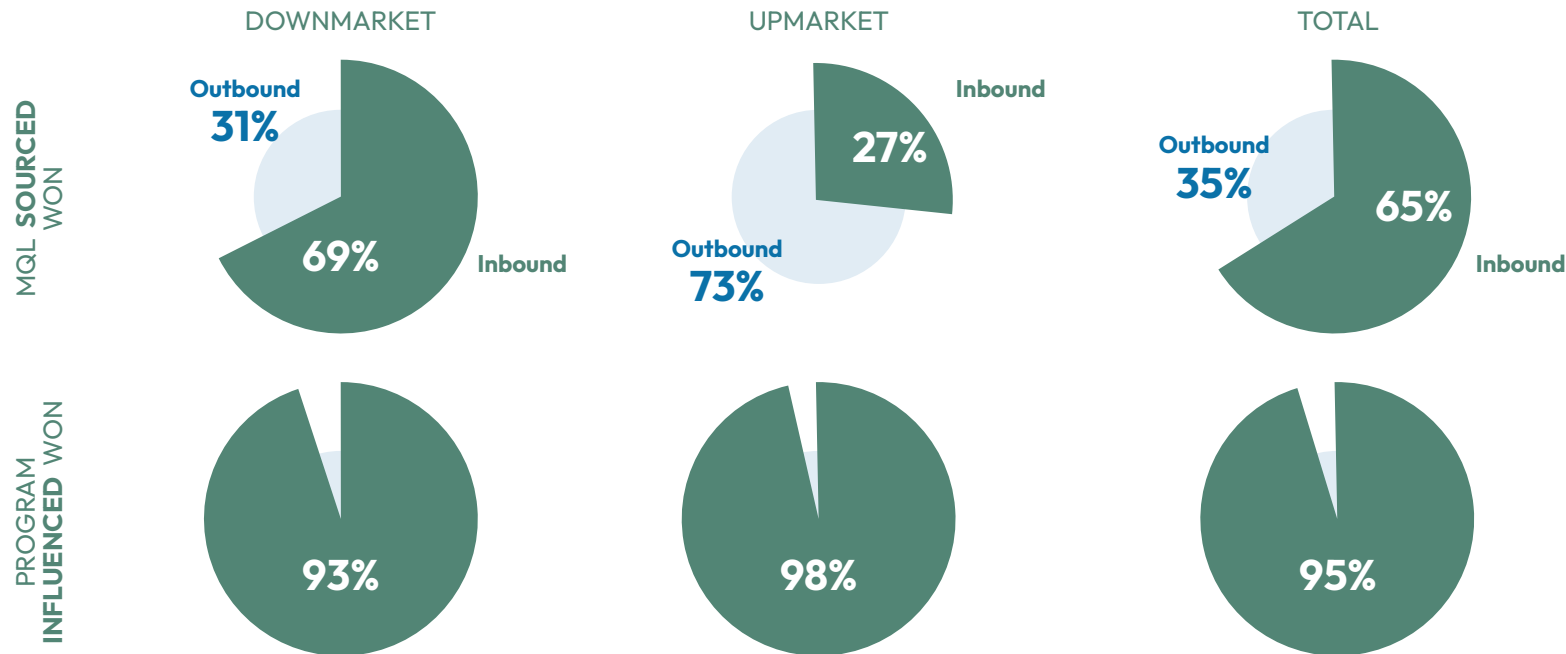


# Marketing *Media Mix*



# Marketing Program Channel Outcomes

## *First Touch & Influenced Attrition*

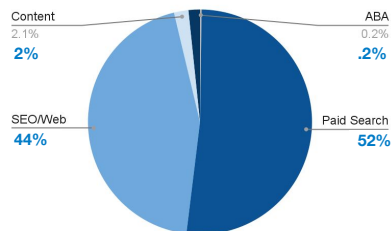


# Program Channel Mix by Segment

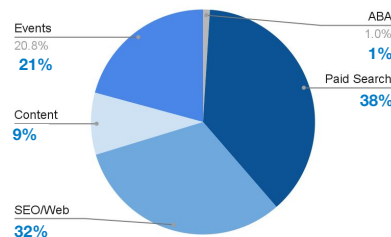
## *First Touch & Influenced Attribution*

PROGRAM  
SOURCED WON

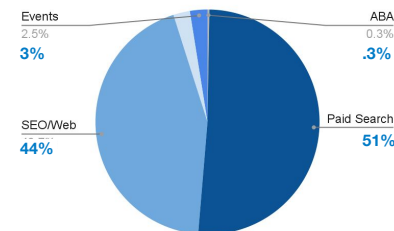
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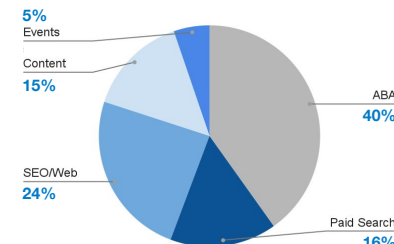
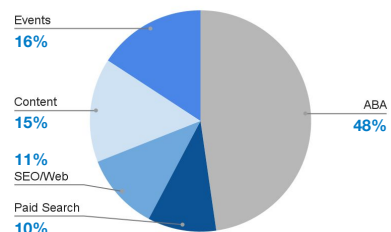
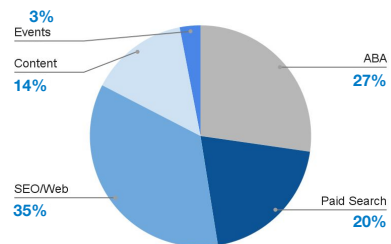
UPMARKET



TOTAL



PROGRAM  
INFLUENCED WON



**Have the ability to  
diagnose your  
performance.**

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# Changing Our Execution:

# Are the GTM teams operating well?

1. What new programs or plays are you trying with your team?
2. What changes have you made to your team or processes?
3. What are your biggest execution challenges?
4. How do Marketing & Business Development work together in your organization?
5. How & when do the teams work hand in hand? Root cause analysis assessment? Training?
6. Do the teams have swimlanes of accountability and own customer acquisition, regardless of source model?

## 2024: MARKETING, BDR & SALES MARKET ENGAGEMENT STRATEGY

1:1  
ABM

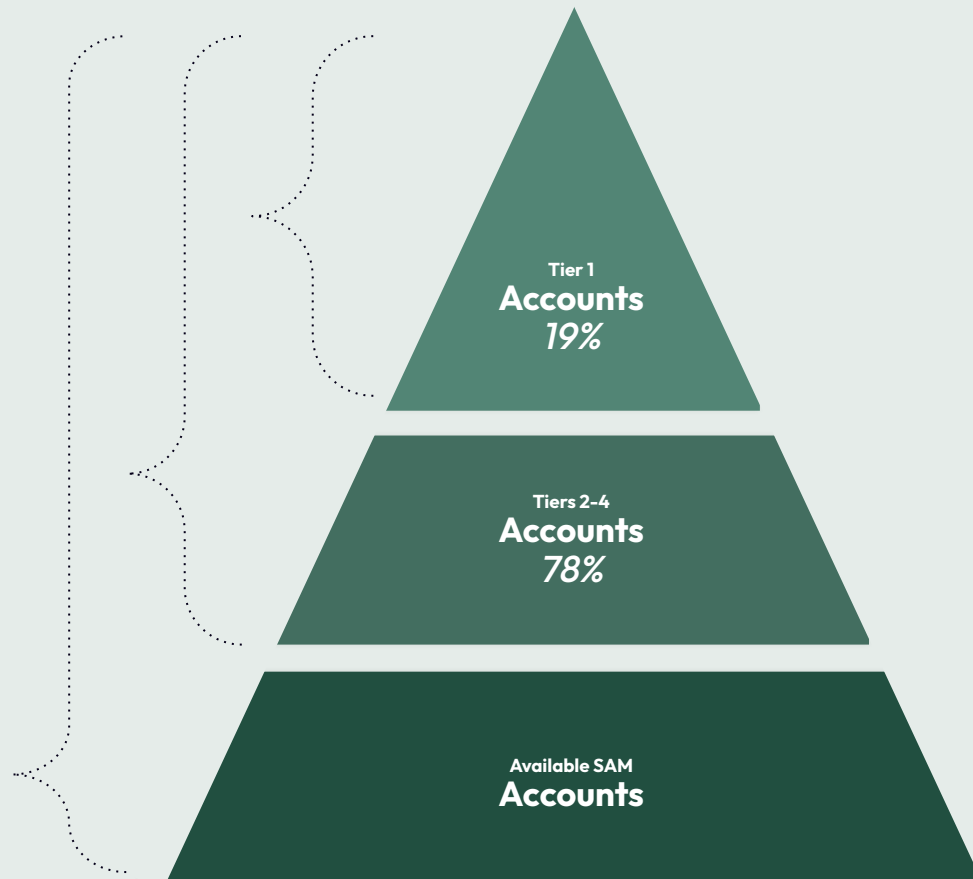
- Comprehensive account plans
- 3 in-the-box GTM orchestration
- Persona based competitive messaging
- Personalized content, RBE, and executive experiences

1:Many  
BDR  
Cadences

- Persona based competitive BDR programs
- Metro market trend BDR programs
- Metro strategic customers & solution partners activated
- Metro & territory field events

1:Many  
Market  
Engagement

- Marketing engagement on 100% of Available SAM units
- Market leading storytelling & thought leadership
- Strategically planned national tradeshow & field events
- Customer advocacy, reference & referral programs





# 2024 Marketing *Tactics*

	ABM Tier 1 Accounts	Event Watchlist	Upmarket SAM
Marketing Campaign & Content Emails	X	X	X
Marketing Campaign Direct Mail	X	X	X
Marketing Campaign Account Based Advertising	X	X	X
Marketing Campaign BDR Outreach	X	X	X
Trade Show Promotion	X	X	X
Executive Field Experiences & Events	X	X	
Event Direct Mail & Gifting	X	X	
Personalized Account Based Advertising	X		
Personalized Direct Mail, Gifting & RBEs	X		
Personalized Content	X		
Personalized Persona-Based Programs	X		
1:1 Marketing, BDR & Sales 3-in-the-Box	X		

# 2024 Monthly Orchestration Crew

MONTH 1		MONTH 2	MONTH 3
MO OF QTR	Per Segment	Per Segment	Per Segment
AGENDA	<ul style="list-style-type: none"> <li>- Review Pipeline Council learnings &amp; Action Items</li> <li>- 90-Day Demand Plan (BDRs, Sales, Marketing)</li> <li>- Upcoming Launches or Big Events</li> <li>- ABM Strategies - Top accounts</li> <li>- Enablement Updates</li> <li>- Action item review &amp; capture</li> </ul>	<ul style="list-style-type: none"> <li>- Review Pipeline Council learnings &amp; Action Items</li> <li>- BDRs, Sales, Marketing Top of Mind</li> <li>- Upcoming Launches or Big Events</li> <li>- BDR &amp; Sales On the Ground Reporting</li> <li>- Enablement Updates</li> <li>- Action item review &amp; capture</li> </ul> <p><b>Next Quarter Plan Review</b></p> <ul style="list-style-type: none"> <li>- Review next quarter plan for input / priority alignment</li> <li>- Review Sales enablement usage + request prioritization</li> </ul>	<ul style="list-style-type: none"> <li>- Review Pipeline Council learnings &amp; Action Items</li> <li>- Upcoming Launches or Big Events</li> <li>- ABM Strategies - Top 10 Accounts</li> <li>- Enablement Updates</li> <li>- Action item review &amp; capture</li> </ul>
ATTENDEES	<div> <b>Marketing</b> <ul style="list-style-type: none"> <li>- ABM Manager</li> <li>- Segment PMMs</li> <li>- Segment Mktg Mgr</li> <li>- Marketing Analyst</li> </ul> </div> <div> <b>Sales &amp; BDRs</b> <ul style="list-style-type: none"> <li>- Sales Leader</li> <li>- Sales Reps</li> <li>- BDR Leader</li> </ul> </div> <div> <b>Sales Enablement &amp; Ops</b> <ul style="list-style-type: none"> <li>- Sales Analyst</li> <li>- Sales Productivity &amp; Enablement Mgr</li> </ul> </div>		

# Tier 1 Upmarket Account Based *Door Openers*



Thank you so much for the ice cream. It was a nice treat. Unfortunately, I will be out of the office during the show. If you are at NAA during June, I will be sure to stop by your booth.

I am aware of AppFolio, as I do have friends in the industry currently using it. We are using Yardi and happy with their product, but should we consider making a change I will reach out.

We are very loyal to AMSI and we are not looking to make a change in the near future. Mark from MBI Solutions keeps us very content with his incredible customer service with any issues we may experience.

If you'd like, we can schedule a call to chat. Thanks again for the treats. Feel free to reach out if you'd still like to connect.

**Be creative & place  
yourself in the shoes  
of your customer.**

**Delighting someone is  
fun, and opens a door  
for dialogue.**

# Are the GTM teams operating well?

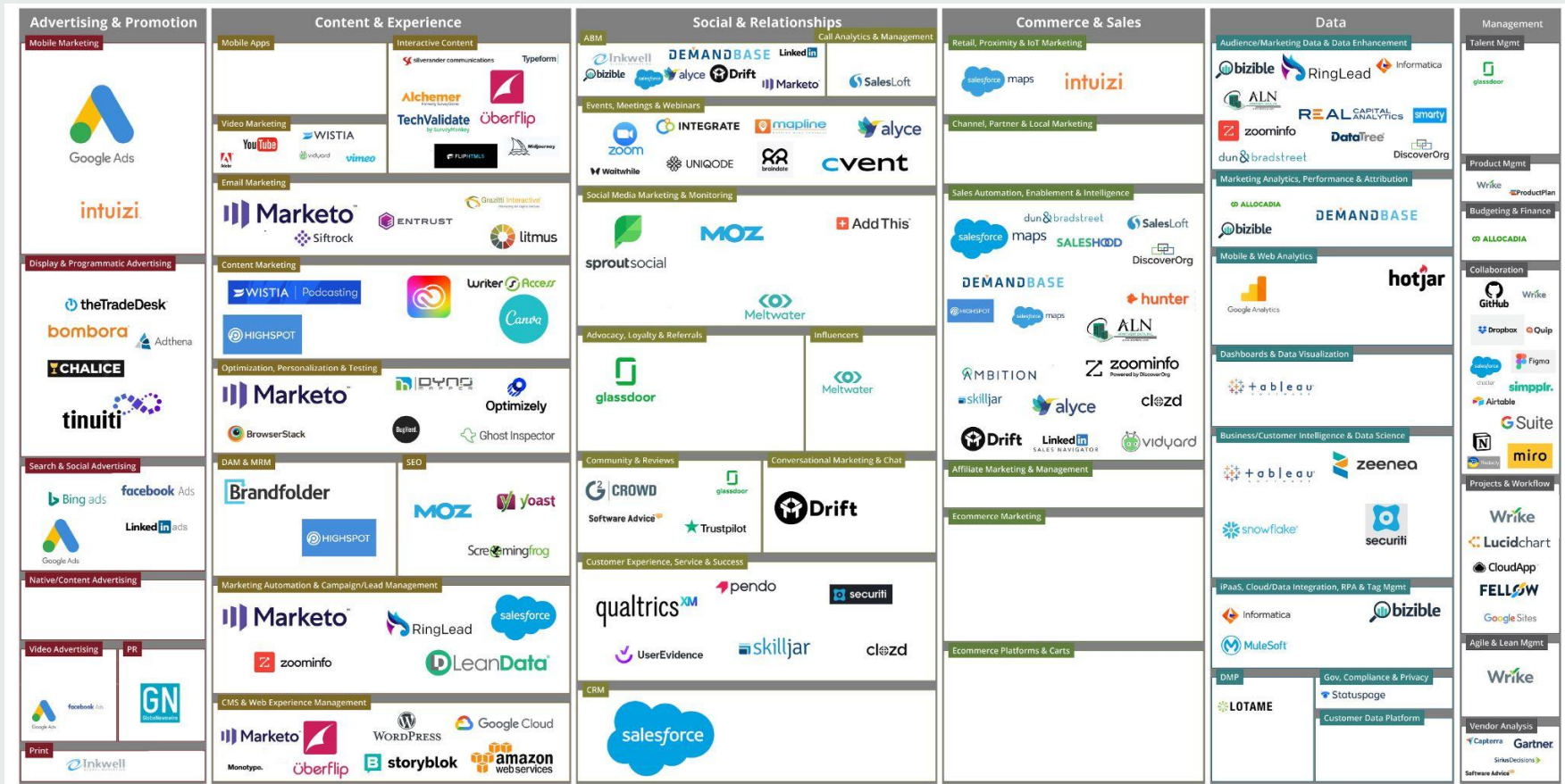
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# The Tech:

# Why your tech stack?

1. Predict & automate digital to human experiences?
2. Predict & automate customer acquisition & growth workflow between gotomarket teams?
3. Automate dataflow & insights?
4. Pipeline velocity?
5. Precise prospect targeting in digital (meeting regulatory spec of course)?
6. Growth modeling, media mix modeling, attribution, etc.?
7. Market mapping?

# MarTech Landscape

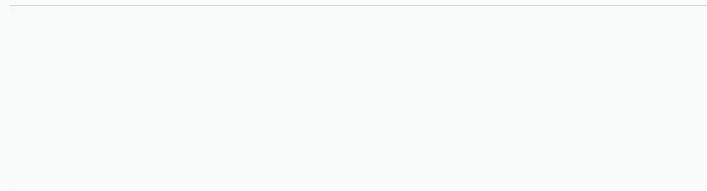




**Your tech should  
enable data insights.**

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*Powering* **the Future of the Real Estate Industry**

# Thank you!