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**HEINZ**  
MARKETING

# THE COMPLETE GUIDE TO INTENT-BASED MARKETING

Written by Socedo and Heinz Marketing

## LEAD NURTURING AS WE KNOW IT IS FAST BECOMING OBSOLETE

In the last decade, we have experienced a transformation in B2B marketing. Marketing automation vendors came to the scene and boomed; persona-based lead nurturing flourished; content became king; marketing operations became a career path; and B2B marketers saw converting leads through the inbound funnel as the holy grail of marketing.

We are now reaching a breaking point. As contact data has become more accessible and marketing automation systems easier to use, consumers are flooded with more and more communication to the point of overload.

According to Epsilon, email click-through rates have decreased by over 40% since 2010, and now most industries see an average click through rate between 2% and 3%. Omni-channel marketing isn't helping marketers much. An Infolinks report states that only 2% of internet users feel like the display ads they see are relevant. No wonder click-through rates have fallen by 98% in the last two decades.

But something even more fundamental is happening. As a buyer's budget is increasingly tightened and more scrutiny is placed on ROI, the buying cycle has lengthened and more executives are looped into the decision-making process.

Given this reality, as marketers, we can no longer market to prospects based on our own timeline, and simply expect a set of emails, advertisements and mailers to drive leads through the buyer's journey. Instead, we must anticipate buyer's needs, the questions they'll ask, and the research they'll find valuable, and be prepared to respond once they take the first step.

In short, we need to listen to our buyer and learn what they care about before we engage. This methodology of listening before engaging is known as Intent-Based Marketing. This is fundamentally a different way of communicating with prospects and customers.

To engage differently, we need to look at a different type of data

Intent-based marketing is about using data to gain better insights into the interests of potential buyers and their impending purchases, so we can focus marketing and sales efforts more effectively

## ADDING INTENT DATA TO YOUR LEAD PROFILE

### HOW DO YOU THINK ABOUT YOUR LEAD PROFILE?

Today, most of us think of lead profile as a set of static fields. It includes things like a person's name and contact information, job title, location and firmographic information such as company size, industry, revenue and perhaps more specific information like the technologies in their stack or their most recent funding round.

But this view of your contacts or leads is becoming outdated. In addition to traditional, static information, you can now collect data on a lead's actions across their entire online and offline pre-purchase experience, including the influencers they follow on Twitter, the questions they posed within a LinkedIn Group or on Quora, the roadshow they just attended, the follow-up email they opened, and the web page they visited three days later.

These pieces of time-based information that give you clues about leads' purchase intent is called [intent data](#). As Lisa Gevelber, VP of Marketing at Google, [wrote in the New York Times](#), "intent is more important than identify."

While demographic and firmographic information are important data points to qualifying leads, marketers should not stop there. You can now tap into intent data sources to identify who is in-market, by leveraging data providers who aggregate and analyze buyers' digital activities or footprints outside of your owned digital properties ( your website, emails). With intent data, you'll gain visibility into the earlier stages of your target prospect's buying journey, so that you can accompany them on their journey rather than forcing them into yours.

## WHAT TYPES OF INTENT DATA ARE OUT THERE?

Broadly speaking, there are two types of intent data. There's data generated through people's engagements with your owned digital content, such as the pages on your website a lead visits, the emails they open, the e-books they download and the links they click on through your social media posts. But most marketers only have this data on a small portion of the leads in their database.

Then, there's data generated people's engagements with content on the broader web (third-party). These actions include reading articles on industry publications (i.e. CIO.com, Marketingland.com), watching webinars on business or technology topics in B2B-focused online learning communities (i.e. BrightTalk.com), and discussing key topics with peers on social media or following influencers in your space on social media.

By tapping into these third-party intent data sources, you can identify in-market prospects and gain insights into what topics they care about. There are many ways to put intent data to use in your marketing and sales processes:

1. Discover new prospects
2. Lead scoring
3. Sales intelligence
4. Interest-based segmentation
5. Content planning
6. Account-based marketing

We will discuss each use case in more detail on the following pages.

## USE CASES FOR THIRD PARTY INTENT DATA

### 1. DISCOVER NEW PROSPECTS

Although it is incredibly easy to source a list of contacts to target based on criteria like job title, company size, and existing technologies in their stack, you won't get very far with this approach. The problem is that you have no information on whether anyone on the list is actively looking for a solution in your category.

With intent data, you can identify the companies and individuals who are showing an interest in your space right now based on the signals you care about.

For example, if you have a business intelligence solution that works on top of SQL Server, you can go to certain intent data providers to help you identify business intelligence professionals who recently joined a SQL server community on Twitter or shared articles in a reputable trade publication about innovations in SQL space.

At this point, there are intent data providers that can help you find individuals who fit your buyer profile and have shown intent based on their online content consumption patterns or social media actions. We will dive into the intent data provider landscape later in this guide. For now, let's take a look at a few types of intent signals you can leverage to build a list of target prospects.

### 4 TYPES OF INTENTS SIGNALS: BUILD A LIST OF TARGET PROSPECTS

#### 1. Find new leads who talk about major events in your industry

Buyers go to conferences, tradeshows and other industry events to gain new insights into the problems their organization faces and to evaluate the technologies that may help them solve their problems. These days, every conference or event comes with its own hashtag for social sharing and many of these conference attendees will Tweet before and during the event.

#### 2. Win customers from competitors

You can build a list of targets for your upcoming "compete" campaign based by finding people who are engaging with your competitors on social media or have visited your competitors' sites.

#### 3. Find people who engage with your technology partners.

If your product is complementary to other products in a target account's tech stack, you can find potential prospects by searching for those who are already engaging with your technology partners on social media.

#### 4. Find people who engage with influencers in your industry

Industry influencers are people and organizations who have industry expertise and are prolific at creating and sharing educational content on the web and on social media. Some intent data providers help you discover new prospects based by identifying people who are following industry influencers on social media and engaging with their content.

## 2. LEAD AND ACCOUNT SCORING

The dawn of marketing automation platforms (MAPs) has changed the B2B marketing game. MAPs not only allow marketers to automate a sequence of communications with prospects, but also track whether - and to what extent - those prospects consumed the content sent to them. These behaviors are then scored automatically to gauge a prospect's sales readiness.

However, there are several problems you'll encounter when you only score people's engagements with your own content.

First, it's problematic to assume that just because someone has consumed a certain amount of content on your website, the person must be interested in your solution. This person could be an intern, a student, or someone simply looking to educate themselves on your space. What you want to know is whether there is a buying initiative taking place at the organizational level. This is where intent data can help.

As SiriusDecisions stated in their [guide on Intent Data Monitoring](#), "intent data monitoring associates the digital behaviors of multiple individuals with the organizations they represent - across all digital channels through which they conduct solution research. This multipronged approach provides stronger evidence of organizational intent

to buy than approaches that use the behavior of any one individual within the organization."

In addition, not all buyers will find your website and content as they research potential solutions - so you may never become aware of a buyer's interest. Finally, many leads in your database are people who engaged with you at one point but have since then gone cold. For many organizations, only a single digit percentage of leads in a marketing automation database have engaged with a marketing campaign in the last 30, 60 or 90 days.

By tracking the activities leads and accounts take before they come to your website and lead scoring relevant activities, you can focus your valuable resources on the buyers that appear to be in-market. For example, if a prospect just followed one of your competitors on Twitter, wouldn't you like to know that?

**Consider adding to your lead scoring system:**

1. When someone engages with your corporate social media accounts. Social media actions including follows, mentions, replies, shares, and clicks on posts all signify different levels of interest and should be weighed in your lead scoring model.
2. When someone reads articles and/or views content on your product category in your space on reputable third party sites/content communities.
3. When someone creates and/or shares content on social media on key topics in your space
4. When someone creates and/or shares content on social media on popular industry conferences or events in your space
5. When someone follows or engages with industry influencers or brands/technologies that are complementary to yours
6. When someone follows, mentions, or replies to your competition on social media

If you think about it, a lot of these intent signals are comparable to traditional scored behaviors. Social media keywords are not all that different from SEO keywords. A link click to a social post is similar to a link click in an email. Someone viewing a webinar on a topic you care about on a third party site (i.e. BrightTalk) isn't all that different from someone viewing a webinar on your own website.


**3. SALES INTELLIGENCE**

Sales teams and SDRs understand the importance of doing research on their target prospects and accounts before reaching out. The insights you can get from intent data provides your sales reps an additional path to connect with customers.

By providing your reps with contextual insights about their target accounts and prospects from third party data sources - such as people's relevant social media actions - sales reps are able to reach out to prospects at the right time and have more engaging conversations.

In practice, it can be difficult to figure out how much lead intelligence you should provide to sales reps and the best format for this information. You want to give salespeople actionable data at the right time, not overwhelm them or distract by sending too many notifications.





Fortunately, some intent data providers can integrate with your MAP, CRM and/or account-based marketing orchestration platform of choice. With these integrations, you would be able to curate the intent signals and notify your sales team about leads’ high value actions in the environment they prefer. For example, intent data providers like Socedo can push Twitter-based intent signals into marketing automation platforms such as Marketo. From there, this data can be synced into Salesforce CRM or an account-based marketing automation & orchestration system such as Engagio.



### Marketo Sales Insight

Add to Watch List ▼ Go!

INTERESTING MOMENTS
WEB ACTIVITY
SCORE
EMAIL

Interesting Moment	Date	Subscribe
<b>Milestone:</b> No Show at webinar with Simply Measured: Full Funnel Impact with Social Data	6/22/2017 5:25 PM	
<b>Milestone:</b> Downloaded Simply Measured co-Whitepaper: Full Funnel Impact with Social Data	6/12/2017 10:55 AM	
<b>Milestone:</b> Tweeted #abm (account-based marketing)	6/4/2017 11:00 PM	
<b>Milestone:</b> Tweeted #LeadScoring	6/3/2017 11:01 PM	

*Example of sales notifications in Salesforce CRM in the form of “Interesting Moments”*



Before a rep reaches out to a lead, he or she can quickly look through the lead’s activity feed and glean the insights necessary to craft a personalized and relevant message. This information can also help sales reps revive cold leads.

Let’s show you how this works through an example.

*Socedo, a provider of B2B intent data from the social web, is looking to sell its software to B2B marketers. The marketing team acquires new leads through various means including buying lists from marketing data providers.*

*Vaughn, a marketing leader at a target company is a lead Socedo acquired through a list buy. Once Vaughn is in Socedo’s marketing database, he starts receiving cadenced nurture emails with content that the Marketing team deems to be appropriate based on Vaughn’s job title and tech stack. Vaughn has received multiple “nurture” emails from Socedo over the course of several months but didn’t open a single email.*

*Eventually, Vaughn followed @SASSoftware - a predictive analytics vendor - on Twitter. Because Socedo tracks a set of social media keywords and handles that indicates interest in “predictive analytics” in their MAP, they’re able to trigger an email in response to Vaughn’s action on Twitter.*

*Vaughn received this email from Socedo (see below) about an hour after he followed @SASSoftware on Twitter. Because predictive analytics was top of mind for Vaughn, he responded immediately and soon became a sales opportunity.*

RE: What is Third Party Intent Data?

Hi Adam,

We are running test with two of the companies mentioned in your blog - Joe and I would love to see what you have to offer. Summer can coordinate.

Best regards,

**Vaughn**

What is Third Party Intent Data?

Hey Vaughn,

Saw you were tweeting about predictive analytics and wanted to share a blog post we wrote called: [Pulling Apart the Curtains on Third Party Intent Data Providers](#).

The article goes over how important intent data and third party intent data is with use cases like listbuilding for account-based marketing, ABM advertising, predictive lead scoring and content personalization.

Are you currently using predictive analytics? Would love to hear more.

Talk to you soon,

**Adam Hutchinson**

#### 4. INTEREST BASED SEGMENTATION FOR CAMPAIGNS

Traditional lead nurturing emails that target people based on job titles and industry are becoming less and less effective. To get higher engagement rates, segment your leads based on people's interests. With third party intent data, you can identify who should be a member of a certain email or ad campaign based on the topics people have shown an interest in.

#### 5. CONTENT PERSONALIZATION

Figuring out what content will resonate with prospects and customers is a major challenge for most B2B marketing organizations. Marketers want to make their content more customer-centric but don't know how. The current set of website and content analytics tools only provide insights on the audience who have already reached a company's website.

Intent data from third party sources can help you make your content more relevant.

For example, if you knew that some portion of your leads are following a certain influencer or brand on Twitter, you may decide to invest in developing joint content with that influencer or brand. If you found out that a number of

good-fit leads are talking about Topic X on social media but you have no content on that topic, it may be time to invest in new content on how your company is thinking about the topic and helping people solve a problem.

#### 6. ADD FUEL TO YOUR ACCOUNT-BASED MARKETING PROGRAM

Account-based marketing is all about focusing your resources on a target set of high-value accounts and utilizing specific, personalized approaches to engage decision-makers in those targets. One big challenge in implementing an ABM program is missing data. Many organizations simply don't have enough data to deeply understand their target prospects' interests and intentions.

With intent data, you can understand which accounts and prospects are showing interest in your product category, reading about key topics in your space or viewing relevant video content in your space right now, and use these insights to prioritize your marketing and sales efforts and tailor your communications.

## WHERE CAN YOU GET INTENT DATA?

At this point, there is a nascent but fast-growing market of intent data providers. But not all intent data is created equal and not all types of signals will be relevant to your business. To figure out which intent signals are the best predictors of purchase behavior and what data provider can meet your desired use case(s), you'll want to understand a few dimensions of the data.

### CAN THE DATA ACCURATELY TELL ME WHO IS BEHIND AN ACTIVITY?

The answer is “it depends on how data is being collected and where data is coming from.”

There are several places where intent data comes from that generally falls into two categories:

1. Company websites, B2B publishers, business or technology-focused online communities
2. Public data from social media networks, i.e. Twitter

At this point, some intent data providers can tell you the person behind the activity. Others can only tell you which company or domain is consuming content in your product category.

Several providers are crawling B2B-focused and general consumer websites for activities that are related to business solutions. These data

providers are using techniques that can generate intent data at the domain or company level.

Some of these data providers have placed cookies on their network of publishing partners' sites to track site visitors' consumption of content on certain topics (Bombora is one example). These cookies are associated with IP addresses. The data provider uses reverse IP-lookup to figure out which domains or accounts these visits came from. If there is a spike of activities within the same domain around a specific topic, then the domain is showing “surging interest” or intent on that topic.

One problem with using cookies to track site visits is that they are frequently deleted. As a result, intent signals around certain topics will be sparse.

Other providers such as The Big Willow are leveraging device tags (on PCs, tablets and phones) to track what devices are consuming certain content. Devices can be tied to specific businesses using reverse IP-lookup.

Using reverse IP lookup to identify “active” companies is not a perfect solution, because IP lookup can only resolve a fraction of IP addresses into accurate domain names, and even fewer outside of North America.

## WHAT SPECIFIC CONTENT HAS THE USER INTERACTED WITH?

For data to be used to pinpoint purchase intent, you need to trust that the content used to produce the activity is actually related to your solution.

It's not enough for a web crawler to find content that matches your product category keyword —let's say "network equipment." Only a small portion of content on the web is going to be very high-focused, in-depth content that would help buyers make a purchase decision, and even less will show up high enough on search engines to drive significant traffic volumes.

At this point, while many publishers/sites are allowing data providers to scan their sites and aggregate the information, premium publishers like Gartner do not allow their sites to be included in these scans. For example, intent data providers are not able to scan Gartner's website to see who is reading the latest Magic Quadrant on Business Intelligence software.

Some of the best intent data on the market today comes from well-known B2B content communities where buyers go to self-educate.

For example, BrightTalk is a well-known webinar content destination for business professionals in

Marketing and Sales. Software developers go to sites by TechTarget (i.e. SearchCloudComputing) to learn about different technologies. Marketing Ops professionals visit software review sites like Capterra or G2Crowd when researching marketing technology like marketing automation platforms.

Because these places provide highly targeted content and users have to register before viewing or download content, they are able to provide strong signals of intent. However, because a user must land on a specific site or a relatively small network of sites, you will be able to get intent data on just a subset of people.

## HOW DO YOU WANT TO UTILIZE INTENT DATA?

A list of active accounts without named contacts restricts its usefulness to marketing activities such as programmatic ad targeting. If you want deeper funnel applications such as lead prioritization or personalized emails, you need to get intent data at the individual / contact level.

In addition to certain B2B content communities and media companies, you can also get contact-level intent data is through providers that leverage public data from social media (i.e. Socedo).

There's a wealth of behavioral data that exists within social media platforms. On Twitter, you can identify potential buyers based on their tweets and following relations. On LinkedIn, you can find potential buyers by looking at their job titles, companies, group affiliations (i.e. Marketo User Group in Seattle, WA), the influencers they follow, and the articles they share and comment on. On Quora, you can look at which users are asking questions related to a specific product category. On Meetup.com, you look at the users who attended certain meetups.

At this point, companies like Socedo can associate activities on Twitter to the leads in one's marketing automation database, and tell you which of your existing leads is researching your product category or business space based on their Twitter activities in real-time.

For example, if you're selling business intelligence software to BI professionals who are using SQL Server, you'll be able to see whom in your database is engaging with other BI/data visualization vendors, who just joined a professional group for SQL users, and who just followed one of your competitors.

When it comes to public data from social media, filtering for the signals from the noise is key. You'll want to run some tests to see whether

leads who show intent signals based on their social media activities are converting at a high rate compared to your baseline (all leads). You may also want to test whether leads who show intent signals are closing into customers at a faster rate (or higher velocity) or turning into bigger deals.

In fact, no matter where you get intent data from, you'll want to test and see whether the leads and accounts the provider flag as "showing intent" are in fact "better leads" than your typical lead. You'll be able to answer the question for yourself by looking at metrics like leads' response rates to your campaigns, conversion rates, sales velocity and average deal size.

## QUESTIONS TO ASK OF INTENT DATA PROVIDERS

To understand whether an intent data provider can support your specific use case, consider asking them the following questions:

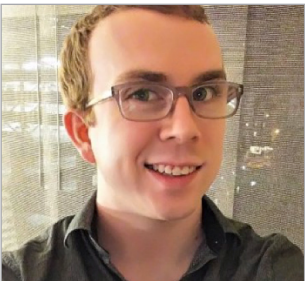
1. What data sources are included in your datasets?
2. Is this dataset proprietary, licensed from third parties, or from other public data sources?
2. Are you providing account/company level data or individual contact level data?
3. Has this data been verified by humans (i.e. via user registration)?
4. What specific intent data can you provide? Can you tell me the specific action someone has taken (i.e. their latest Tweet, survey answer that there is a buying initiative for a new technology in the next 12 months?)
4. What is your data gathering methodology (i.e. website crawlers/scrapers, cookies, device tags, reverse IP address lookup, user volunteered data, API access from public sources like Twitter)?
5. What is your data match rate? What percentage of contacts in a typical CRM or marketing automation database can be matched back to the data providers' database
6. How often do you update or refresh this data?
7. What format does the data come in? Do I have to log into your system to access the data or can I consume it through direct integration with my marketing automation or CRM system? Is it available through an API?

## ABOUT THE AUTHORS



### JINGCONG ZHAO

Jingcong Zhao is currently leading Content Marketing at Socedo. Jingcong's experience in the B2B marketing space includes building out the marketing function at an early stage startup in the 9 Mile Lab Accelerator program, handling corporate communications at Tableau and most recently, overseeing content at Socedo. [@JingcongZhao](#)



### ADAM HUTCHINSON

Adam Hutchinson is a Senior Marketing Manager at Socedo. Adam oversees the Demand Generation function at Socedo and is a Marketo Certified Expert. He has previously worked in marketing operations at Amazon and F5 Networks. He Tweets about all things marketing [@adamiswriting](#)



### MATT HEINZ

Prolific author and nationally recognized, award-winning blogger, Matt Heinz is President and Founder of Heinz Marketing with 15 years of marketing, business development and sales experience from a variety of organizations and industries. He is a dynamic speaker, memorable not only for his keen insight and humor, but his actionable and motivating takeaways. Matt's career focuses on consistently delivering measurable results with greater sales, revenue growth, product success and customer loyalty.

You can follow Matt on Twitter [@HeinzMarketing](#) and view his background on [LinkedIn](#).

### ABOUT SOCEDO

Socedo's mission is to help B2B businesses of all shapes and sizes better engage and communicate with their customers by utilizing intent data from the social web. Socedo has built out a demand generation system fueled by social media intent data. Socedo integrates with leading marketing automation and CRM systems including Marketo, HubSpot, Oracle Eloqua, Pardot, and Salesforce. Socedo is based in Seattle, WA. Socedo was founded in 2012 by Aseem Badshah and Kevin Yu and is backed by investors including TechStars, Vulcan Capital and Divergent Ventures. Learn more about Socedo at [www.socedo.com](http://www.socedo.com)

Find prospects who are showing interest in your product category with a [trial of Socedo](#)



### ABOUT HEINZ MARKETING

Heinz Marketing is a B2B sales and marketing acceleration firm that delivers measurable revenue results. We connect marketing and sales like no other to make companies' demand generation engines more efficient & successful. [www.HeinzMarketing.com](http://www.HeinzMarketing.com)

