SERENA™

## OVERVIEW

Serena Software Inc. is a Silicon Valley-based software company known to be a leading provider of Orchestrated IT solutions for the Global 2000. The company is also one of the largest global Application Lifecycle Management solution providers with more than 2,500 enterprise customers. Serena was seeking to expand its marketing functions, and to better understand how marketing efforts were influencing closed business.

## STRATEGY

The initial effort focused on an Analytics Pilot where Serena's marketing team sought external support to leverage data science and business intelligence tools to visualize data from Microsoft CRM Dynamics, Google AdWords and Marketo. When the resulting dashboard showing marketing influence demonstrated significant value for marketing and sales, a data model was built to further support these visualizations.

## GOALS

The overall goal was to utilize analytics to identify, solve, and gain insight into core business questions. This included:

- Demonstrating to sales the amount of opportunities influenced by marketing
- Enabling marketing to segment and compare distinct campaign efforts associated with specific opportunities
- Enabling marketing to measure the correlation between pipeline and sales quota
- Enabling marketing to track paid search efforts at the macro and micro level

## SOLUTION

- Using consistent naming conventions across campaigns, URLs, and their CRM
- Implementing custom business logic to allow for more insightful data arrangements
- Configuring data architecture to apply holistic attributions to opportunities, and to centralize lead data for more complete analyses
- Creating four actionable dashboards to track and compare marketing performance

## RESULTS

The set of analytical dashboards allowed for higher and more accurate lead quality insights such as:

### 367%
**RETURN ON AD SPEND FOR PAID SEARCH AND DISPLAY CAMPAIGNS**

### 53%
**OF NEW OPPORTUNITIES WERE INFLUENCED BY MARKETING**

### $1.1M
**IN OPPORTUNITIES WERE INFLUENCED BY PAID SEARCH**

### 34%
**OF ALL OPPORTUNITIES WERE INFLUENCED VIA MULTIPLE CHANNELS**

### 64%
**INFLUENCED BY JUST ONE CHANNEL**

## CONCLUSION

With new insight into what was and wasn't working for them, Serena was able to refocus their efforts on the channels that had been most effective for them historically. Their new dashboards provided a way to monitor ongoing performance, and they were able to get a true closed-loop look at the success of their marketing programs. The end result was—and continues to be—smarter marketing attribution.