



# GRADUATING WITH MARKETING AUTOMATION HONORS

## Wiley Saves Thousands of Work Hours and Maximizes Conversion Rate With Automated Campaigns

With a decade of experience in email marketing, Carrie Ugarte joined Wiley Education Services ready to build a rock-star team that could strategize email campaigns across the funnel. As one of the premiere companies in higher education consulting, Wiley continually needed to deliver a wide range of messaging. Its communication had to resonate with students and their families through the whole student journey, from enrollment to graduation.

But Wiley had challenging lessons of its own to learn, which could only be taught through marketing automation. By removing the manual aspect from how both sales and marketing engaged leads, Ugarte could make a positive impact on almost every level of Wiley's business.

First, adopting M.A. would encourage a deep database cleanse. In order to automate with industry-leading tools like Oracle Eloqua and Salesforce, Wiley would need to be confident that it housed valid, standardized data. Second, it would encourage sales and marketing to work together, breaking down the traditional silo. Third, it would enable both marketers and salespeople to reevaluate how efficiently they nurtured and converted leads, respectively. Was the time and energy invested by Wiley worth the engagement generated?

### "Our Hypothesis Was We Could Still Convert Them"

When Ugarte and the team analyzed Wiley's target audiences, they discovered that the sales team was set up to fail. Reps were spending months chasing down leads who had extremely low odds of converting into customers. "We actually calculated the odds that [these leads] would convert to be 0.02%," Ugarte said. Those odds were barely more than 1% of 1%, and were a clear misuse of resources.

#### CHALLENGES:

- Without marketing automation, Wiley was lacking clean, standardized data in Oracle Eloqua and Salesforce
- Wiley's Sales and Marketing teams were not working together in the most efficient and effective way possible
- An extremely low lead conversion rate suggested that there were issues collecting data for Sales higher in the funnel

#### SUCCESSES:

- A new email program gave Wiley valuable insight into the goals, pain points, and behavior of its prospects
- Thanks to marketing automation and better data, more targeted email communications save the Wiley sales team 82,000 hours of work time

#### HEADQUARTERS:

Oak Brook, IL

#### OVERVIEW:

As a core part of the Wiley business, Wiley Education Services is underpinned by more than 200 years of experience in global education. We are a learning business, helping people across universities develop the skills and knowledge they need to achieve their full potential and succeed in an increasingly competitive and dynamic market.

It would have been easy to blame sales for this low conversion rate, but Ugarte felt the problem originated higher in the funnel. With more strategic, data-driven engagement by marketing, she believed higher-quality leads could be created, which would help sales convert more prospects. “We needed to take better care of these audiences,” Ugarte explained. “Our hypothesis was we could still convert them.”

## 90 Days to a Fitter Database

The marketing team decided to test this hypothesis with an email campaign powered by marketing automation. “When I first started working at Wiley,” Ugarte recalled, “my boss told me something great: ‘I would rather you try something and fail than not try anything at all.’” The team started the test by organizing Wiley’s database, so that Eloqua and Salesforce could successfully ‘speak’ to each other as the systems and their data fields synced. Then, with the help of three partner companies, the marketers engineered the campaign within Eloqua using its proprietary Program Builder tool.

The goal of this new program? To remove leads from the sales queue if they still hadn’t engaged with sales after 60 days of contact. With the new campaign built in Eloqua, Ugarte and her team would then be able to automatically feed these disengaged leads into a 90-day workflow that could determine if they were still interested or not in Wiley’s services.

## Three Paths to a Cleaner Queue

“We’d ask the lead a simple question” in this automatic email campaign, Ugarte said. “Are you still interested in our degree program?” At that point, a lead could take one of three paths based on how they interacted with the three available call-to-action (CTA) buttons in the inquiry email: (1) “Yes, I’m still interested,” (2) “No, I’m not interested anymore,” or (3) no CTA click.

If a lead clicked the ‘yes’ CTA, then the campaign would automatically connect them with a sales rep, who would then attempt to re-engage. If they clicked the ‘no’ CTA, then they would be opted out of all communication with Wiley—emails, phone calls, and SMS—which would save the business resources that otherwise would’ve been sunk into pursuit that was a lost cause. This would also therefore enhance conversion rate, by preemptively removing the leads most likely to lower it.

Leads who answered negatively would also be directed to a landing page for a loss survey, in which Wiley asked these leads the reasons they chose to disengage. By analyzing the responses to this survey, Wiley could then find patterns in engagement drop-off and improve its messaging and targeting for the future. In this way, even the ‘no’ replies would give Wiley valuable insight into the goals, pain points, and behavior of its prospects. “Everything we do, we do to make sure that when we target an audience, we are targeting them correctly, from start to finish,” Ugarte said, “with personalized experiences that use very timely and appropriate follow-ups by sales.”

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*Carrie Ugarte*  
Marketing Automation/Email  
Marketing Manager

For leads who didn’t respond at all to the “Are you still interested?” question, the marketing team sent two nurture emails that described Wiley’s value proposition in a unique and highly differentiated way. These emails also factored in advice that sales had given marketing, with Ugarte ensuring these emails addressed the two main objections that reps said leads often raised during the student journey.

## Saving the Sales Team 82,000 Hours

This email automation campaign worked wonders for Wiley. First, it proved correct the hypothesis that Ugarte had set out with: that with strategic targeting, old and seemingly disengaged leads could be brought back into the fold and transformed into engaged, responsive prospects.



Secondly, it produced “amazing” outcomes that the marketing team could never have foreseen.

“In the pilot, we had approximately 33,000 leads flow through. We estimate on average that our sales team—who adopts these leads—either emails, calls, or texts [a contact] 15 times,” Ugarte said. “We also estimate that the time spent on each contact is about 10 minutes. If you multiply all those numbers together, it equates to about 82 hours of time [per lead] we get to give back to the sales team.”

Marketing automation, in other words, gave back 82,000 working hours to the sales team. And, as the old saying goes, time is money. “That’s time we get to put back into reaching out to leads who are actually interested and

who are more qualified,” Ugarte said. “That lets our sales team do what it does best: [focus on] the best possible leads that we have.”

The loss survey was also a win. With over 1,500 people completing the survey (a 60% completion rate given the number of ‘no’ respondents), Wiley gained data about its positioning and its relationship with users that Ugarte could only characterize as “golden.” This information will help the business adjust its products and services, so it can maximize value for students and their families. And thanks to the email campaign’s sync with Eloqua and Salesforce, Wiley’s marketers can analyze the data more deeply than ever—discovering links between how they target and how people engage that can be translated into even better future programs.

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