



# STATE OF INTENT DATA

MARKETERS CREATE INTENT PROFILES, CURATE SELF-SERVICE  
BUYING JOURNEYS & NURTURE BUYERS POST-SALE WITH  
FIRST-PARTY INSIGHTS

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# Introduction

Every marketer wants to target the right prospects at the right time with the right information. The goal is to get in front of buyers as they research their next big investment *before* your competitors have a chance to drown out your message. What makes that possible? Intent data.

The evolving buyer demands of the modern digital world are changing how companies collect and leverage intent data — for the better. As a result, organizations can access more intent data than ever before, uncover anonymous leads and create online maps that seamlessly guide prospects through each step of their buying journey.

Although actionable intent data is becoming easier to discover and manage, adoption remains low. While the concept of intent data has been around for close to a decade, many companies are just starting to fully explore the best methods of harnessing it to grow their businesses. Only **28% of marketers** say they have an intent data strategy in place, and just **23% intend to create** a strategy within the next 12 months. Of the respondents who use intent data, their top challenge was data integrity.

“The whole way we think about intent data is being redefined,” said Paul Green, Director of Marketing Technologies at **Extreme Networks**, a networking company. With that said, organizations are beginning to leverage intent data at all stages of the buyers’ journey.

To shine a spotlight on the untapped potential of intent data, this report provides actionable insights, including:

- How organizations are combining insights generated from multiple data sources to create personalized intent profiles for leads, prospects and customers;
- The combination of intent data with AI and predictive analytics to seamlessly discover and route leads and identify a buyer’s next move;
- The uses of intent data post-sale, such as upselling a complementary solution or circumventing potential cancelations; and
- Solutions, strategies and best practices for simplifying intent data collection and activation processes to promote increased adoption and success.



# Assessing The Current State Of Intent Data

The experts interviewed for this report agreed that intent data is experiencing a rebirth. “We are seeing a re-emergence — not just in new technology and new solutions available — of marketing decision-makers and even a significant increase of sales leaders showing interest in intent and being able to use it to drive their outbound strategies,” said Chris Rack, Chief Revenue Officer of **DemandScience**, a B2B and demand gen marketing analytics provider.

While he characterized it as the “early days” of intent data, John Steinert, CMO of intent data provider **TechTarget**, said many organizations are experiencing its impact. “We are seeing use cases that are bearing fruit for companies. People are starting to get a feel for the idea that not all intent data is the same.”

While intent data is becoming a common commodity amongst marketing and sales teams, they are still determining the best ways to operationalize it. “A lot of people are sitting on actionable data, but they don’t necessarily have the processes, procedures or skills to be able to take action the way that they would want to,” said Caleb Rule, Inbound Marketing Manager at **The Pedowitz Group**, a revenue marketing agency. The marketing and sales teams are becoming more collaborative regarding intent data, Rule said. “Intent data can be the glue that kind of brings those two teams together to bring those processes to light.”



# Leveraging Multiple Data Sources

Leaders in using intent data are tapping multiple data sources to compile intent profiles at various levels — individuals, organizations and current customers. Most companies use internal first-party and third-party data from outside providers collected from various sources.

Steinert said there is a growing focus on second-party data, which is another organization's first-party data. He noted second-party data can be helpful for marketers because it provides the ability to reach a new audience with interests similar to their customers. Second-party data also tends to be more accurate as it comes directly from the company that collected it.

While combining data from multiple sources has advantages, Rule says internal data continues to rule.

“You should be combining data from various sources, but the reliance on first-party data has only become greater,” he explained. “Third-party data enables you to identify more accurately who your customers are and what they're doing. This puts first-party data on an even higher plane than it necessarily was in marketers' minds previously.”

Companies that rely on first-party data face several challenges — the phasing out of cookies and more people working from home, to name a few, which make it difficult to use IP addresses to identify visitors' companies.

“We're at a crossroads when it comes to thinking about privacy in a cookie-less world,” said Extreme Networks' Green.

Keeping these privacy challenges in mind, Green's company is redesigning its website. “Like a lot of companies, we're blowing up our Website. We're redesigning our website from the ground to be more like a consumer website, even though we're a B2B company. We haven't been happy with the digital experience we provide, and it's becoming so important now.”



# Navigating The Role Of AI & Predictive Analytics

While combining multiple data sources is critical, it creates a mountain of information for marketers to sort through. Green said marketers are looking to add predictive analytics to their marketing stack as they expand their data resources.

“We’re trying to target and prioritize large pools of accounts, and we’re using predictive models to help us do that,” Green said. He noted that as the technology evolves, B2B marketers will apply predictive and AI capabilities at the individual level.

“AI and machine learning are in their early stages, but that is evolving,” Rack said. “The ability for deep learning over time is where machine learning and algorithms come into play, and most companies don’t have enough first-party data collected to have an impact.”

Leaders such as Adobe have been able to leverage AI and machine learning, Rule said. “Using Adobe Sensei, they’ve been able to customize the website imagery to reflect certain characteristics a person is interested in, such as data versus advertising.”

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**CALEB RULE, THE PEDOWITZ GROUP**



# Boosting Post-Sale Success With Intent Data

While high-quality intent can help companies of any size identify potential customers, it becomes valuable once prospects convert to customers. “Intent data is useful once someone becomes a customer because you can monitor what they’re interested in,” Steinert said. “We see people using intent data to get that first deal, and then using it to build the deal.”

Post-sale use of intent data is helping companies boost revenue while avoiding the higher costs of acquiring new customers. “We are starting to see companies with diverse product suites using intent data to upsell existing customers,” Rack said. A company may have purchased your HR software for recruiting, for example, but they may be looking to add performance management.

Rack noted that it is not just about randomly reaching out to customers to sell them additional products. “It’s about understanding what topics, products and areas they’re looking at expanding into, and then arming the sales and the marketing team with the data.”

Intent data can also help spot customers who are looking to leave. Analyzing the signals from customers who have canceled can help identify customers at risk and reach out before you lose them.



# Applying Best Practices

There are many lessons companies can take away as they expand their use of intent data to include more data and stages of the buyers' journey and post-sale interactions.

Marketers should focus on audience segmentation to optimize their use of intent data, according to The Pedowitz Group's Rule. "Take the time to experiment and try to figure out what segments work best for you, for all parts of the journey. The more in-depth that you are with your segmentation, the better you're going to be able to act on the intent."

DemandScience's Rack suggested avoiding data overload. "A lot of B2B marketers try to ingest too much data. If you really simplify and focus on a couple of very specific but very relevant data points and build from there, it drives significantly more ROI in the long term."

While paring your data is important, marketers also need to pay attention to data quality and how the data they're purchasing aligns with their business goals, TechTarget's Steinert said. "Because this data can be so rich, companies need to think about what their objective is, and therefore what requirements they have before simply purchasing a source. Because sources are ideal for a variety of objectives, depending on what's contained in the data."

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**CHRIS RACK, DEMANDSCIENCE**

# Aligning The Power Duo:

## HOW TALKDESK SOURCED \$1M IN PIPELINE WITH TECHTARGET PRIORITY ENGINE PROSPECT-LEVEL PURCHASE INTENT

**Talkdesk®** is a high-growth global cloud contact center leader for customer-obsessed companies. Its automation-first customer experience solutions optimize customers' most critical customer service processes. The company's speed of innovation, deep vertical expertise and global footprint reflect a commitment to ensuring that businesses everywhere can deliver better customer experiences across any industry and through any channel, resulting in higher customer satisfaction and accelerated business outcomes.

However, the company needed to find a way to grow its pipeline and more effectively align its sales and marketing teams to fuel growth.

### The Challenge: Aligning Sales & Marketing To Drive High-Quality Opportunities At Scale

As the traditional contact center market transitions to a more cloud-based, omnichannel platform, Talkdesk is in a prime position to lead this change, which has been reflected in the company's tremendous growth. In the last two years alone, Talkdesk has doubled its employee base and tripled in valuation. In order to continue its upward trajectory, marketing was under more pressure to find the right prospects, expand and enhance its database and fuel more effective nurture strategies. Meanwhile, sales needed a better process and source of insight to prioritize the right opportunities and close more deals. Most importantly, both teams needed to collaborate more closely to grow opportunities and pipeline with their most important named accounts.





## The Solution: TechTarget Priority Engine Purchase Intent Platform & Services

Talkdesk chose **TechTarget** as a trusted partner to help it fuel and scale growth in the market. Armed with rich prospect-level purchase intent insight from TechTarget's leading Priority Engine platform, combined with engagement services and dedicated enablement and support from Customer Success, Talkdesk was able to start seeing results very quickly.

Millions of active prospects and up-to-date buying signals from Priority Engine help keep the database fresh, so the marketing team can build more targeted segments and message the right audiences with confidence for better conversion. Leveraging those same insights, sales reps can prospect better, progress the sales cycle with active buying teams and close more deals by knowing specifically who to contact and what to say.

### **SUPPORTING MORE INTELLIGENT MARKETING & SALES WORKFLOWS & ACTIVITIES**

Using Priority Engine, the marketing team identifies prospects who have engaged with its content (e.g., through syndication services across the TechTarget network and on its own website). Then, it uses filters to find ideal leads (e.g., by industry, buying stage) and compile a list of high-quality contacts.

Next, the marketing team syncs lists in Marketo to implement persona-based nurture streams. Using data on the prospect interactions, it can identify leads ready for sales conversations and route them to sales reps.

Meanwhile, the sales team has a systematic process for handling these leads. First, the accounts lists are uploaded back into Priority Engine and email alerts are sent out to account executives (AEs) and sales development reps (SDRs).

Thanks to Priority Engine's intelligent integration with Salesforce, reps can quickly access the information and reach out to the right prospects. They can leverage insights from Priority Engine on each account to create an outreach sequence and inform more effective outbound motions.

### **ENHANCING DAY-TO-DAY SALES PRODUCTIVITY & ALIGNMENT**

Priority Engine facilitates the collaboration between AEs and SDRs on the same target account. Email alerts are sent out at the start of each week to align the teams on which high-priority accounts to focus on and what talking points to use based on account-level insights.



SDRs then put prospects into their outreach sequence. Using data from Priority Engine, the sales team can influence the entire buying committee by reaching out to all the contacts to surround the account. Then, SDRs will share the information they gather through their outreach motion with the AEs.

Priority Engine also surfaces contacts within Talkdesk's CRM that currently shows buying signals. It can then enrich the information and AEs and SDRs can add these new contacts to Salesforce and generate high-potential opportunities.

### **ENABLING TEAMS FOR MAXIMUM EFFECTIVENESS & PIPELINE DEVELOPMENT**

Talkdesk has established a standardized process, so everyone on the sales team progresses through the same motion. It ensures that every rep is working on the highest priority targets by providing a customized list for each AE and SDR. The marketing team also uses this list for its campaigns to ensure alignment between sales and marketing activities.

Training and enablement are critical to achieving a high level of usage and adoption. Talkdesk works with the TechTarget Customer Success team to educate its team on how to use Priority Engine and integrate the tool into their day-to-day workflow to improve pipeline development.

The training materials are incorporated into Talkdesk's internal systems for easy access. TechTarget also offers recurring training sessions to show reps how to use prospect and account insights in their outreach.

Lastly, the information in Priority Engine is shared with sales leaders so they can help their reps build out their territories and pipelines more effectively. These sales leaders also have access to the platform to view the accounts and provide specific guidance.

In addition, Talkdesk needed to gain leadership buy-in to increase adoption by sales teams. It did so by building business cases to prove ROI, running pilot programs to validate the results and providing visibility across the organization. Customized reports from the TechTarget team offer further insights into usage and adoption to help Talkdesk's leadership ensure that it's getting the most out of its investment.



## The Results: Talkdesk Sources 10,000+ Quality Prospects & \$1M In Pipeline

Priority Engine's highly targeted intent data and integration with Salesforce and Marketo helped Talkdesk achieve better sales and marketing alignment and synchronization around shared account and prospect insights. Since sales and marketing teams use the same account lists, there's no cross-functional breakdown.

The direct connections streamline sales reps' workflow. They can see what's happening within an account and which contact has been active (e.g., visiting the website, downloading content). They can also get insights into buying team members and reach out to the right contact.

Since using Priority Engine, Talkdesk has seen improvements in its sales metrics. Insights and intent signals on accounts and contacts help the sales team focus on the right opportunities and move them down the funnel more quickly.

The company has already sourced \$1 million in the pipeline from Priority Engine, and the number continues to grow. It has added more than 10,000 high-quality, in-market prospects from the platform into its database to continue to build momentum with target accounts.



# Conclusion

Intent data is a powerful tool that impacts every stage of the buyers' journey and beyond. Timing is everything, and intent data is critical to reaching prospects and customers with the relevant information early in the decision-making process.

While first-party data is vital to determining intent, many companies incorporate multiple data sources to determine when a person or company is most likely to be receptive to their messaging.

A wealth of data is usually a good thing but requiring humans to sort through a mountain of information means it may be too late to act by the time you determine intent. AI and machine learning are automating the process.

As companies increasingly rely on intent data at all stages of the buyers' journey, data quantity, quality and audience segmentation can power success.

Intent data provides a huge competitive advantage, Steinert said. "You can't have less access to data intelligence than your competitors in today's world."

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**JOHN STEINERT, TECHTARGET**



DemandScience is a global buyer intelligence platform that accelerates demand generation for the world's largest software, technology and B2B companies. Leveraging decades of experience in B2B market intelligence, analytics, content trends, and predictive intent, DemandScience delivers healthy data and prioritized buyer insights that align sales and marketing professionals with more qualified audiences.

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