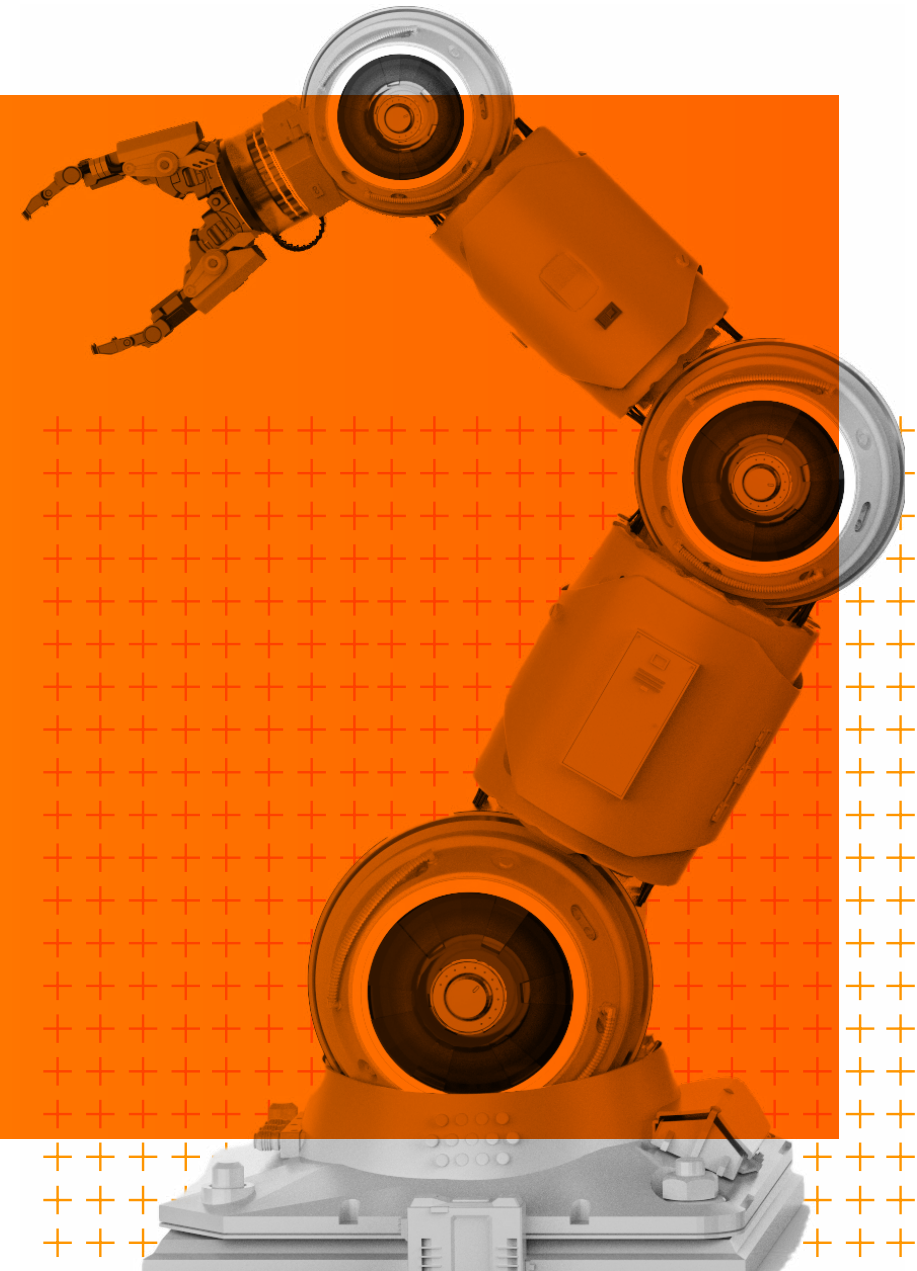


# The Operations & Processes Survey Report:

New Research Reveals Common Missteps in Data Hygiene, ABM That Lead to Breakdowns Along the Buyer's Journey, Lost Revenue



All too often, a stellar marketing team finds itself handicapped by an inefficient tech stack. Without the right platforms in place, B2B teams must wade through dirty data and siloed processes – turning their quest to identify, engage, and convert prospective buyers into an arduous, time-consuming task.

It's not surprising, then, that only one-third of people who responded to the Operations & Processes Survey Report said they are very confident in their organization's ability to execute lead routing and scoring. When asked to assess their ABM capabilities, the findings were equally disappointing.

Inadequate data and processes were common themes throughout the survey results. In fact, 52% of marketers said the top challenges keeping them up at night are lack of confidence in data, increasing pressure to maintain high data quality without better tools or processes, and an inability to measure attribution due to incomplete visibility into marketing and sales activities.

It's clear that there's a large disparity between where most B2B teams find themselves today and their potential. Organizations looking to

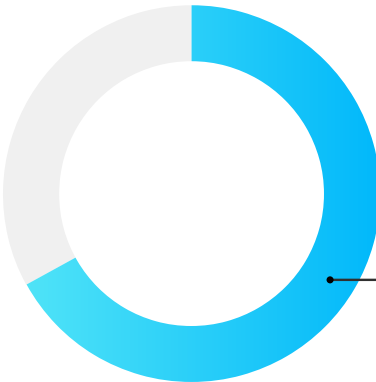
improve data quality, streamline operations, and ramp up revenue in the new year must turn their focus away from siloed sales and marketing tools and instead embrace a unified RevOps platform that cuts across all revenue-generating processes and can connect insights throughout all aspects of the buyer's journey.

This survey report analyzes common shortcomings among the marketing processes and operations of today's B2B teams. Topics covered include:

- + Major obstacles that marketers encounter during lead routing and scoring;
- + Gaps in account-based marketing strategies and the root causes behind them;
- + Common database missteps and the importance of maintaining good data hygiene; and
- + How a RevOps platform can improve marketing processes, drive cross-department alignment, and ultimately boost revenue.

# The Dangers of Dirty Data

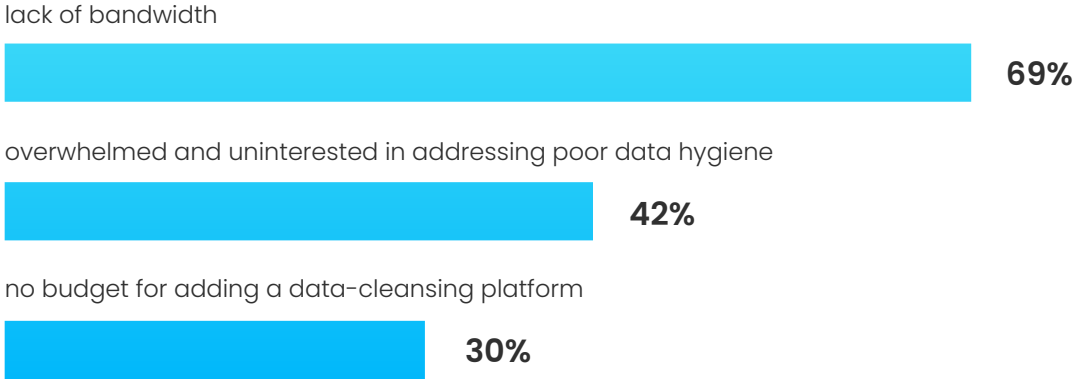
What's most alarming is that most marketers struggle to cleanse their data, a crucial process for ensuring accuracy.



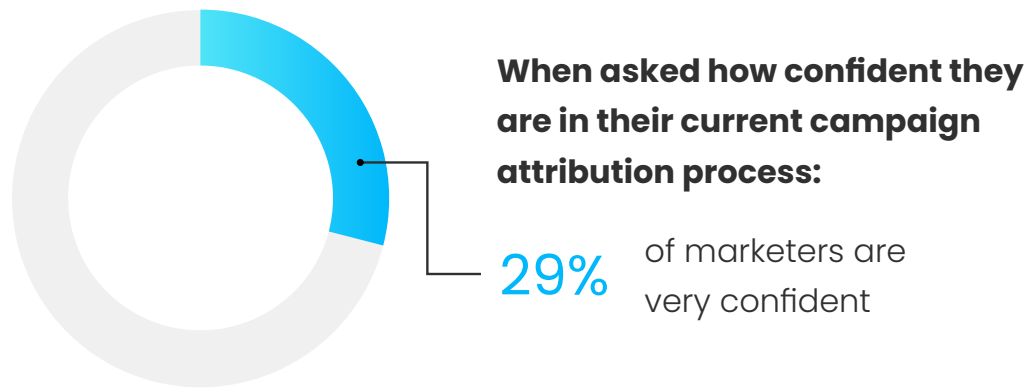
**When asked how confident they are in their ability to standardize, enrich and deduplicate key data fields:**

**67%** are only somewhat or not at all confident

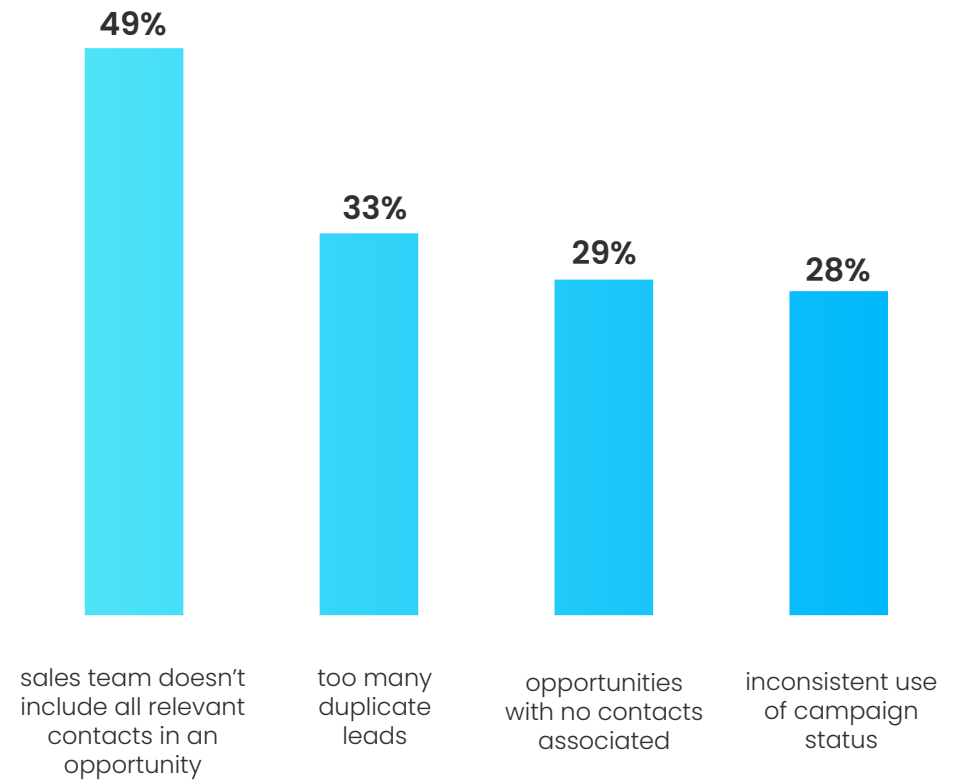
The biggest obstacle, cited by **69%** of respondents, is a lack of bandwidth, which implies many teams are working with siloed data across multiple platforms and have been forced to conduct cleansing processes manually. It's unsurprising, then, that **42%** are overwhelmed and uninterested in addressing poor data hygiene. Meanwhile, **30%** said there is no budget for adding a data-cleansing platform.



If ignored, however, dirty data negatively affects every downstream data process, not only resulting in leaky sales funnels, but also hampering an organization's ability to assess which tactics are working and which aren't.



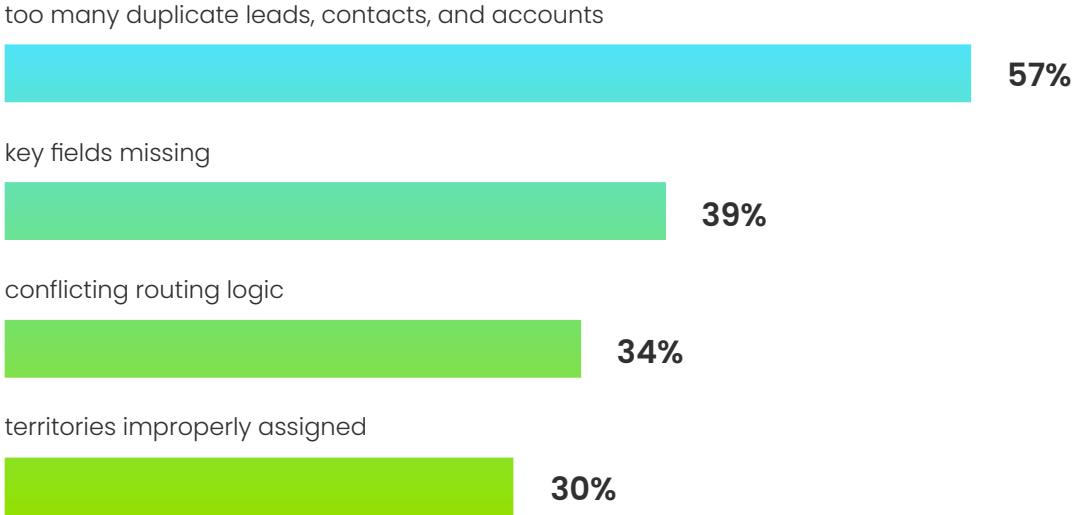
**+** When asked about the challenges holding them back, poor data hygiene was a common theme. In fact,



# Gaps in Lead Routing, Scoring Lead to Missed Opportunities, Misalignment with Sales

Lead management is the bedrock of marketing and sales success. A poorly constructed strategy will result in inaccurate or incomplete leads, poor response times for qualified prospects, and gaps in the handoff from marketing to sales, all of which translate to missed opportunities and lost revenue.

Yet, the survey revealed that many organizations are significantly lacking when it comes to their lead management processes. A staggering 69% of respondents admitted to not being confident or only somewhat confident in their ability to accurately deliver inbound leads from a marketing program to the right person in sales. The biggest obstacles holding back today's B2B teams include:

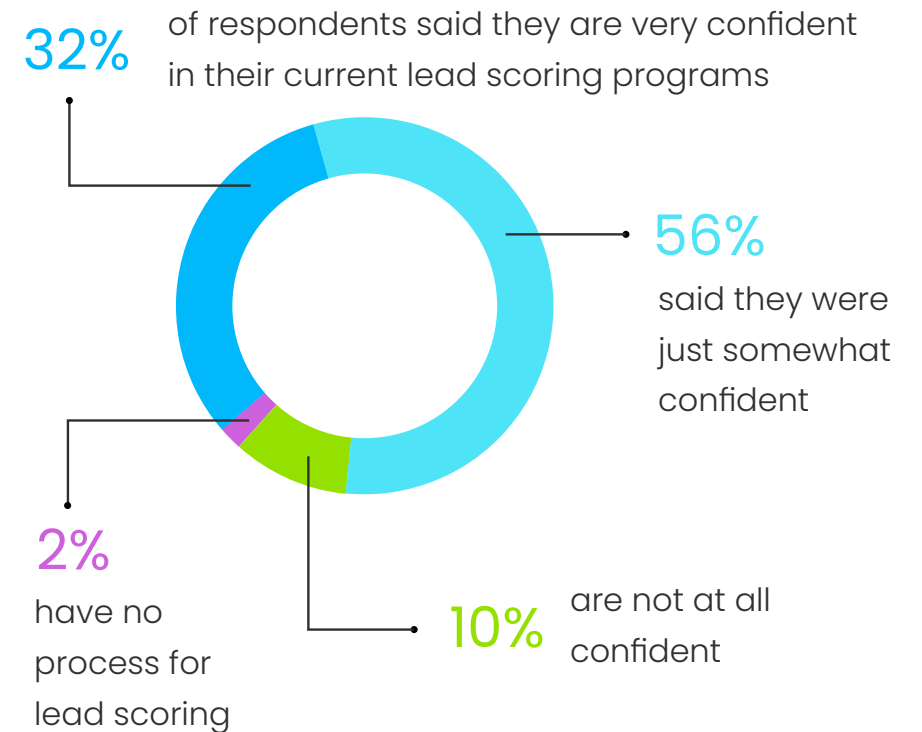


Similar themes were echoed in the write-in responses, where one participant noted they often receive “activity from leads that no longer work at the organization.” Others confessed that they struggle to create a “lead process that sales will adhere to,” or are unable to “set up an automated process” for lead routing.

The top obstacle for lead scoring, as cited by **48%** of participants, is creating models that genuinely reflect buyer intent. Other common challenges center on lead enrichment:

- + **42%** struggle with incorporating technographic data into their scoring models
- + **37%** are unable to integrate demographic data on job level and function.
- + Adding in firmographic data, such as company size, industry, and revenue, is difficult among **35%** of respondents.
- + **35%** also struggle with incorporating internal signals about buying behavior, including the email and website activity of prospects.

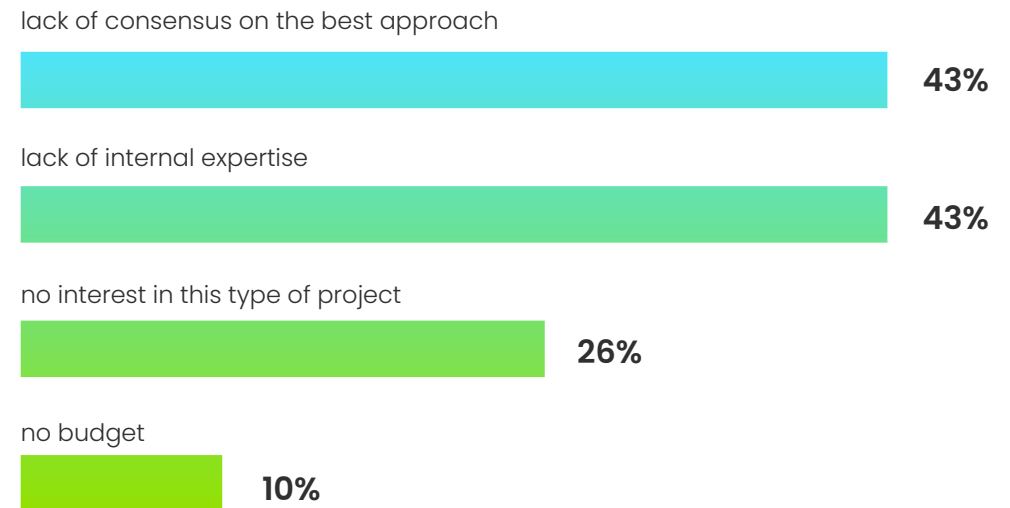
### When it comes to assessing leads and their propensity for conversion:





**When asked where they experience difficulties in segmenting their prospective database:**

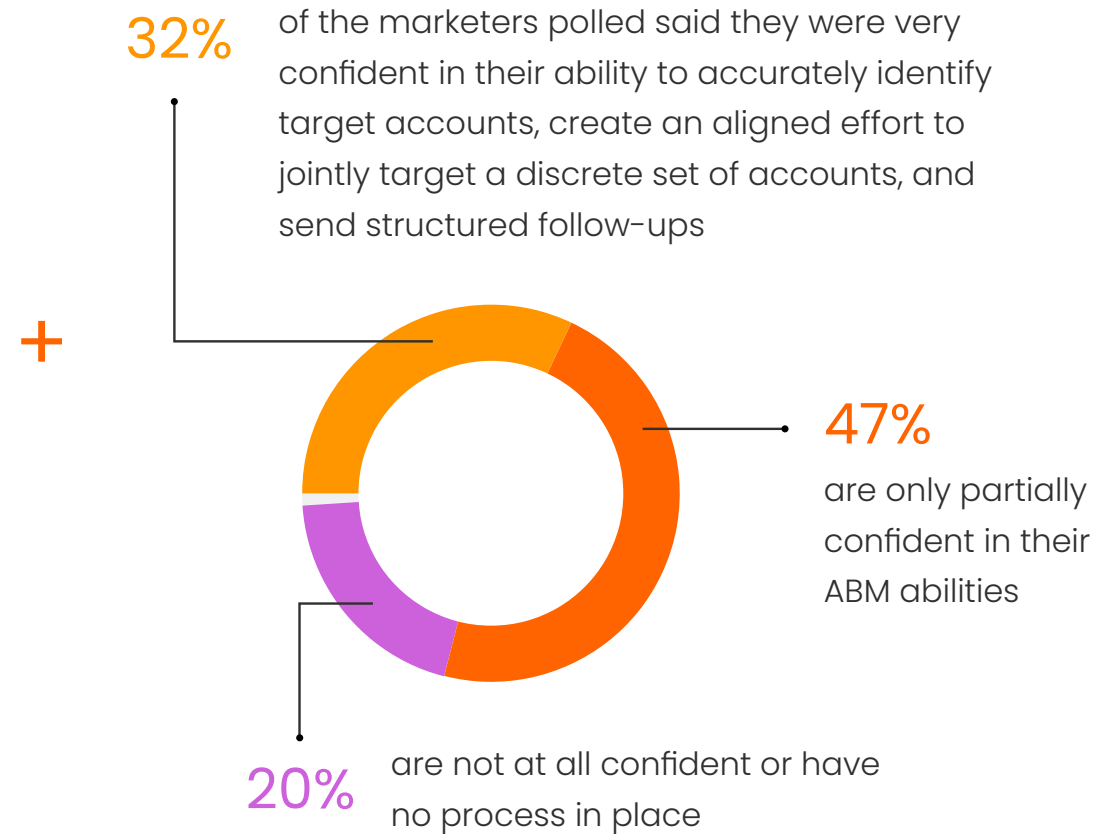
**68%** pointed to demographics, industries, job functions, or product interest



# Most Marketers Unequipped to Execute Effective ABM Campaigns

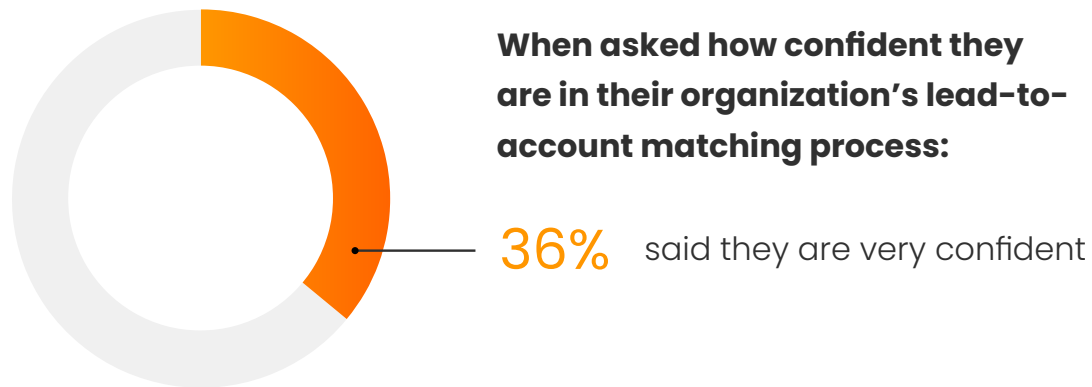
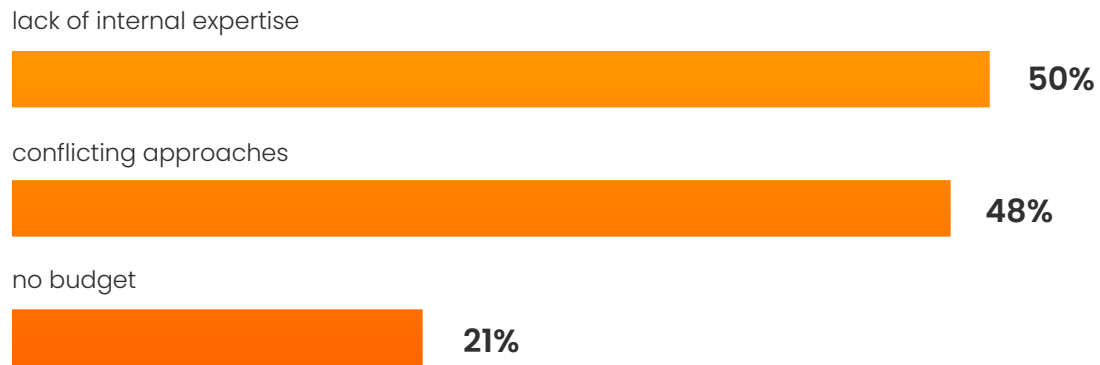
One of the best metrics for assessing marketing maturity and success lies in an organization's ability to execute effective ABM programs. Top-tier teams will build robust, 360-degree profiles on prospective buyers and use these in-depth analytics to personalize each touchpoint along the buyer's journey, improving engagement along with the likelihood of conversion.

While most marketers can agree on the importance of ABM, the survey findings show much work is needed to fine-tune current strategies.

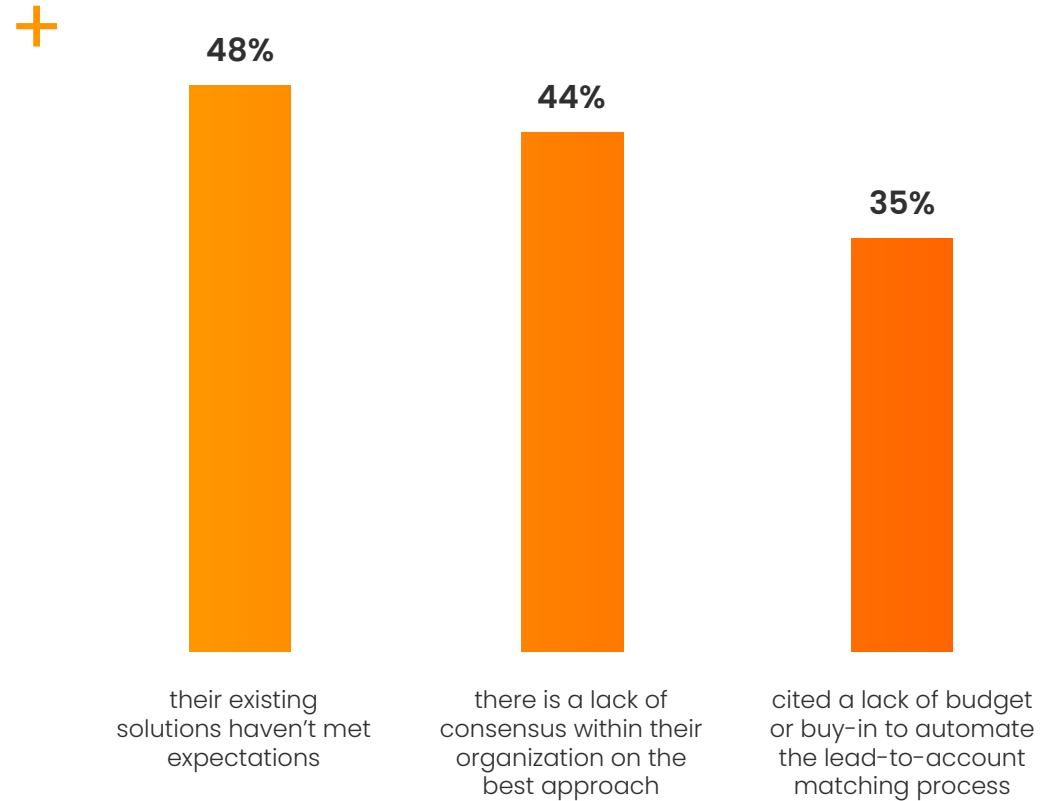




These ABM shortcomings were blamed on people, processes, and tightened purse strings. In fact, 50% of respondents cited lack of internal expertise as their top challenge to ABM success, while 48% pointed the finger at conflicting approaches, and 21% blamed no budget.

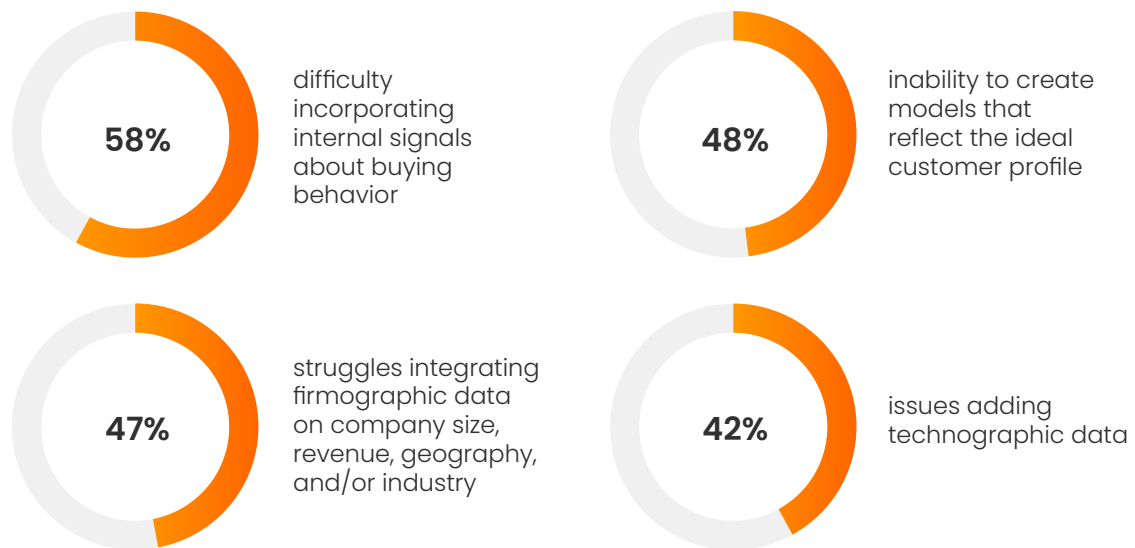


**When asked about challenges in this area respondents said:**



One respondent even noted in the write-in section that they are currently executing the process manually.

Account scoring efforts are also falling short, with less than one-third (31%) of marketers currently satisfied with their strategies. The remaining 69% are only somewhat confident, not at all confident, or don't have any process in place for account scoring. Common challenges include:



When it comes to account/territory management, 46% of respondents said they lack consensus on the best approach, 38% said there is a lack of internal expertise, and 14% cited budget constraints. For these reasons, well over half of marketers (59%) surveyed said they are only somewhat or not at all confident in their ability to execute territory planning, account hierarchies, scoring, and routing. What's worse, 5% admitted to having no process at all.

Altogether, the findings revealed that many B2B teams are operating under an ad hoc approach to ABM and would greatly benefit from a comprehensive platform that can automate critical tasks, enrich account profiles, and reduce the risk for error.

# Dirty, Siloed Data Hinders B2B Teams from Getting Full Buyer Insights, Measuring Campaign Success

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Best-in-class B2B marketers use data to inform every decision and touchpoint along the buyer's journey. The more insights they can gather on leads, the better they can tailor the messaging to each buyer's needs. But doing so requires accurate data that is updated in real time — an issue many marketers struggle with, particularly when juggling dozens of disparate platforms that don't work well or communicate with one another.

According to the survey results, less than half of marketers (43%) said they are very confident in their current data onboarding and list loading processes.



Even fewer (31%) are satisfied with their data unification programs' ability to aggregate buyer insights across marketing automation, sales automation, and other platforms.



For both data onboarding and list loading, respondents cited little internal expertise (45%), no interest in this type of project (36%) and a lack of consensus on the best approach (35%) as the top three challenges.

# Conclusion

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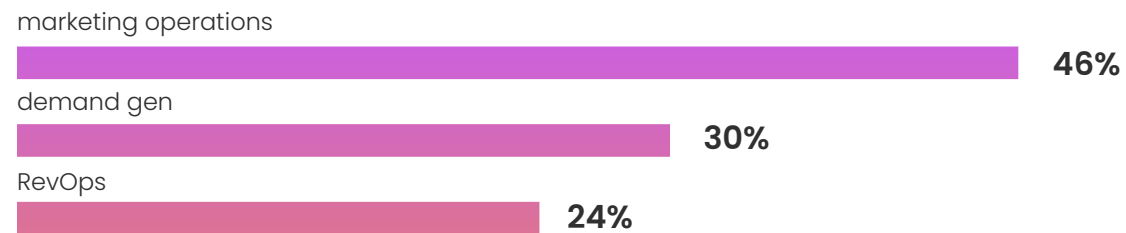
As the RevTech landscape evolves, and revenue operations grows in importance as both a role and a mindset, B2B organizations that resist streamlining their tech stacks risk being left behind. Outdated, siloed processes will only drive subpar results, and marketing teams that are forced to conduct data cleansing and other processes manually are sure to burn out.

Unlocking the next level of marketing maturity requires a RevOps solution that can unify, cleanse, and enrich data at every step along the buyer's journey. But the true beauty of RevOps lies in its ability to bridge the gaps between marketing, sales, and other revenue-generating departments. With a RevOps data automation platform in place, internal teams can finally align around a single set of metrics and methods, allowing them to better assess current campaigns and the areas in need of optimization in order to drive results in the months ahead.

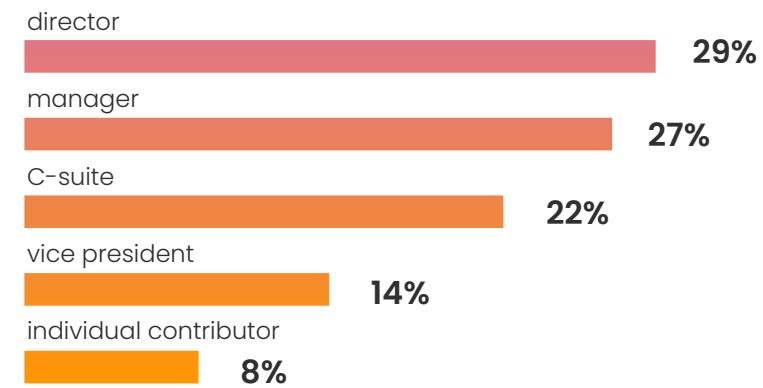
# About the Survey

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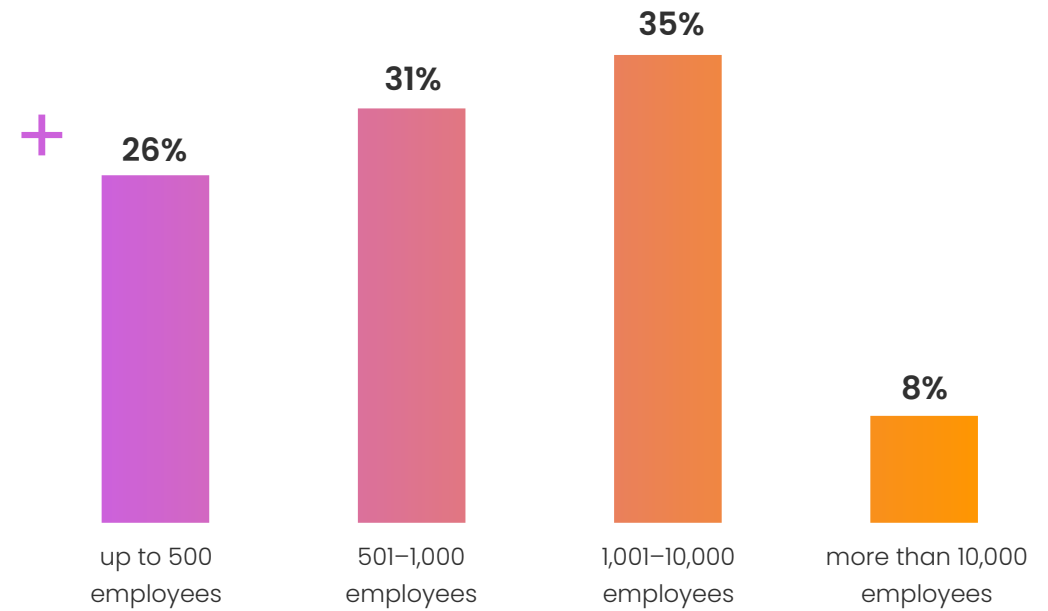
The Operations & Processes Survey Report includes responses from nearly 100 B2B marketing professionals. All respondents sit within revenue-generating teams, including marketing operations (**46%**), demand gen (**30%**), and RevOps (**24%**).



They comprise a variety of organizational levels, including director (**29%**), manager (**27%**), C-suite (**22%**), vice president (**14%**), and individual contributor (**8%**).



The survey pool includes respondents from small, midsize, and large organizations, demonstrating that data and process issues affect businesses of all sizes. In fact, **26%** of respondents work for companies with up to 500 employees, **31%** belong to an organization with between 501 and 1,000 employees, **35%** have 1,001 to 10,000 employees, and **8%** have more than 10,000 employees.





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