

# THE LIST OPTIMIZER™

POWERED by List Intelligence™

## MESSAGE FROM THE PRESIDENT

It has been an exciting year leading up to Oceanos' tenth anniversary. With client needs shifting dramatically, so has our proprietary List Optimizer™. With its release two years ago, the application provided us a platform to seamlessly query across a few large, crowd sourced databases. The result was improved segmentation and deeper reach with our client's target audience.

Today, the List Optimizer™ is not just a list building query tool, but rather a system of List Intelligence™ processes for optimizing demand creation and database building programs. The new List Optimizer™ includes a Business Intelligence and Executive Intelligence suite. The business intelligence suite is powered by Bureau Van Dijk, a leading business intelligence provider tracking firmographics and financials on 24 million companies. To augment this firmographic data we have made a significant investment in the areas of competitive intelligence, social media and other custom data feeds.

The List Optimizer™ executive suite is focused on identifying your ideal contact names from across an expansive network of approved data sources. With an internal KnowledgeBank capturing seven years of list performance metrics, our data strategies are best-in-class.

It's our goal to proactively find ways of connecting unique pieces of business intelligence with traditional marketing data to create a data solution which provides our clients a competitive advantage. In 2012, we'll continue to build technology and increase our internal capital to make this a reality. I welcome you to experience how Oceanos can optimize your demand creation programs.

**BRIAN HESSION, PRESIDENT & FOUNDER**

**LIST OPTIMIZER™ SUMMARY:** The Oceanos List Optimizer™ is a collective system of list intelligence™ processes that in combination yield “smart data”. The combination of unique research methodology, vast network of approved data providers, and business intelligence attributes provide sales and marketing with a continual pipeline of contact and account intelligence. The result is a robust, repeatable, demand creation engine.

# LIST OPTIMIZER™

powered by List Intelligence™

## Business Intelligence

### Firmographics & Financials



#### COMPETITIVE INTELLIGENCE

- Software Installs
- Equipment Purchases (UCC-1 Filings)



#### SOCIAL MEDIA INTELLIGENCE

- Contact level intelligence
- Executives move tracking



#### COMPANY DOMAIN INTELLIGENCE

- Platform to support account-based demand creation programs



#### CUSTOM BUSINESS INTELLIGENCE

- Custom data extraction
- Specialized research databases
- Job title heat mapping

## Executive Intelligence

### Purchase



### Rental

- Business publishers
- Industry databases
- Associations & communities
- Product buyers

### Custom

- Non traditional list building
- Social media extraction



### KnowledgeBank

- 7 years of aggregated list performance metrics
- Hundreds of publisher lists benchmarked
- Predictive indicators to maximize response
- Minimizes list fatigue and reduces risk

## Data Quality Stack



#### SPECIALIZED PROCESSES

- Email address append
- Job title & firmographic append
- Social media enhancement
- Data hygiene processing
- Merge-purge & suppression
- Custom programming

## BUSINESS INTELLIGENCE

**Firmographics & Financials.** The List Optimizer's™ firmographic and financial intelligence is powered by Bureau Van Dijk, a leading business intelligence provider that combines information from over 100 sources including *Morningstar*, *LexisNexis*, *FactSet*, *Dun & Bradstreet*, *Economist Intelligence Unit* and *Thomson Reuters*. The database contains over 24 million U.S. and Canadian companies providing detailed financial and firmographic intelligence for public and more importantly, privately held companies.

**Competitive Intelligence.** Oceanos aggregates competitive intelligence from hundreds of sources including annual reports, news releases, trade publications, UCC-1 filings, surveys, social media, and other online sites. The resulting data is reviewed by analysts, standardized, and assigned a confidence value. The research methodology is systematically repeated to identify and validate new and existing intelligence. This knowledge empowers sales and marketing to effectively engage with its competitor's accounts or to reach prospects with complimentary offerings.

**Social Media Intelligence.** LinkedIn and Twitter offers sales and marketing a wealth of information at both the contact and corporate level. Oceanos is continually exploring different approaches of utilizing this information to assist in audience identification, segmentation and prioritization. We are currently building technology to track executive moves by combining social media information with millions of contact records to identify the person's new company, job title and email address.

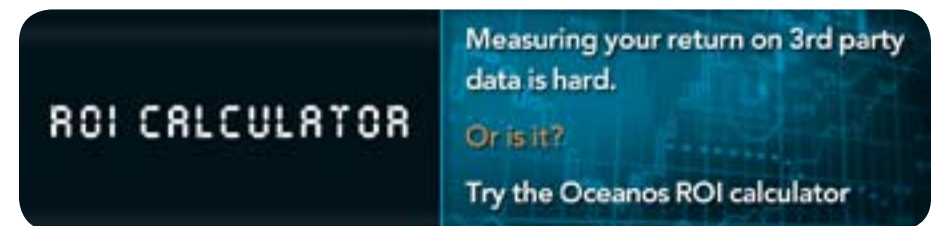
**Domain Intelligence.** The domain intelligence application takes a company name and then appends its URL and active email domains. The tool includes the following two processes:

- **Company Domain Database**

The company domain database includes millions of company names with their corresponding URL and active email domains. The refresh cycle identifies new companies, validates existing URL and domain combinations and flags inactive companies.

- **Matching Algorithm**

The domain matching algorithm includes a weighted moving average to optimize enhancement accuracy. The algorithm's data points include results from a series of matching scenarios, a company name to domain character comparison, and lastly a powerful Google API company search and data extract. Each enhanced record is assigned an accuracy score. All enhanced records are manually reviewed for accuracy and based on program tolerances; a final data set is produced. The resulting intelligence provides sales and marketing a platform for designing account based demand creation programs.



Measuring your return on 3rd party data is hard.  
Or is it?  
Try the Oceanos ROI calculator

ROI CALCULATOR

**Custom Business Intelligence.** Oceanos and its approved research partners are systematically securing business intelligence from hundreds of sources including annual reports, news releases, trade publications, UCC-1 filings, surveys, outbound activities and custom data extraction. The resulting data is filtered, stacked and mined to maximize accuracy. The key is the isolation of actionable intelligence that can increase the effectiveness of segmentation, content alignment and ultimately response.

## EXECUTIVE INTELLIGENCE

**Contact Level Intelligence.** Oceanos streamlines the sourcing of contact data and architects the list strategy to optimize your demand creation and database building programs. We work with hundreds of data vendors including all the providers offering full contact records for perpetual use such as Data.com, NetProspex, ZoomInfo, OMNI, Penton and several smaller, vertically focused providers. Our expansive data network also includes thousands of list rental sources including business publications, associations, communities, product buyers and industry focused databases. To round out the portfolio, we leverage non-traditional sources and social media to manufacturer custom contact records.

**KnowledgeBank – predictive indicators to maximize response.** The KnowledgeBank aggregates list performance metrics from thousands of Oceanos client campaigns. It benchmarks hundreds of publisher lists and establishes predictive indicators that help reduce risk. The KnowledgeBank stores over seven years of proprietary intelligence and serves as the foundation of Oceanos metric driven list strategies.

**Data Quality Stack.** The Data Quality Stack includes a series of quality control processes to ensure data efficiency beginning with the **Bankruptcy Graveyard** – a real-time database that tracks companies that have filed for bankruptcy or closed. Next in the Data Quality Stack is the **Email Address Graveyard** which assists in screening out bad data. The final process within the Data Quality Stack is **Telephone Verification** which disposes bad phone numbers and flags direct dials to maximize call efficiency.

**Specialized Processes.** The Business Intelligence and Executive Intelligence processes can be adapted to help you overcome the challenges of optimizing, growing and maintaining your database. Many organizations, large and small, are not realizing the potential ROI present within their own data nor do they know where to begin to right the ship. The List Optimizer™ will provide data hygiene, validate and enhance house records with firmographics, job titles, email addresses and custom business intelligence to optimize all types of demand creation and database building programs providing you a competitive marketing advantage.

“Third-party data is a challenge for b-to-b marketers. Companies have to be smarter and more effective with their targeting and segmentation. The old approach of buying general lists and hoping some contacts on it are the right ones for your message simply doesn’t work in the new buyer-controlled world.”

– Megan Heuer  
Service Director,  
Marketing Operations Strategies  
SiriusDecisions



## LIST OPTIMIZER™ CASE STUDY #1

### GLOBAL PC MAKER LEVERAGES “COMPETITIVE INTELLIGENCE” TO DRIVE RESPONSE

A global technology company was seeking to build brand awareness and drive response from within the computer-aided design and engineering audience (CAD/CAE).

#### CHALLENGE – IDENTIFY ENGINEERS BY CAD/CAE SOFTWARE BRAND

The client built individual portals for leading CAD/CAE brands including Dassault Systemes, PTC, Siemens PLM and Autodesk. The campaign objective was to drive design and product engineers to one of the four CAD/CAE portals via a series of impactful email creative designed by the client’s creative agency that featured brand specific messaging. For example, the subject line for targeting SolidWorks users read, “SolidWorks – 5 Greatest Performance Challenges.” Since messaging referenced the specific CAD/CAE brand, accurate audience segmentation was imperative.

#### SOLUTION – TARGET ACCOUNT BASED LIST STRATEGIES SUPPORTED BY COMPETITIVE INTELLIGENCE

Oceanos designed a data asset allocation strategy comprised of a list portfolio that included pedigree engineering publications, communities and societies. To acquire the software install intelligence, Oceanos aggregated data from a myriad of sources including annual reports, news releases, trade publications, social media and other online sites. The resulting data was reviewed by Oceanos analysts, standardized

and assigned a confidence value. With this competitive intelligence insight, the Oceanos research group was able to develop a named account list for each target CAD/CAE platform. These named accounts were then enhanced with their corresponding email domain and bundled by brand. The resulting domain string was utilized as a “filter” to segment the engineering contact lists. The creative assets were then aligned to the appropriate segment, deployed and tracked.

#### RESULTS – 200% INCREASE IN EMAIL CLICK-THROUGH RATE

The segmentation and content alignment yielded impressive results. As the chart below illustrates, the average click through rate exceeded 3.34% — **nearly triple** the average. To maximize the success of this ongoing campaign, individual list performance was evaluated and a full scale list strategy was established to ensure comprehensive reach within the target audience and, more importantly, to minimize list fatigue. The result is a robust, repeatable, demand creation engine.

## LIST OPTIMIZER™ CASE STUDY #2

### MAJOR SEMICONDUCTOR COMPANY IMPROVES COST PER QUALIFIED OPPORTUNITY

The customer, a multi-billion dollar, multi-national producer of semiconductor devices, is a leading provider of analog and digital integrated circuits. The company’s chip designs are sold to high-tech manufacturers in both the U.S. and abroad. With a long history of strategic marketing and list knowledge, their marketing team had been actively testing rental lists for several years. Working directly with individual list management firms, the company had successfully

identified a set of core lists that reached the high tech market, and produced higher than average response rates.

### **CHALLENGE – HIGH NUMBER OF RESPONSES, BUT FEW QUALIFIED LEADS**

Despite the appearance of success, the marketing team was plagued by complaints from their sales organization that many of the contacts resulting from campaigns were not qualified. Examining the budget spent on ongoing list rentals, while cost per respondent was low, cost per qualified lead was very high. The marketing team knew they had to do something to improve this ratio, but they weren't sure where to start. However, they were reluctant to work with a list broker; the team felt they understood their options in the list market, so they wondered where a broker would add value.

### **SOLUTION – LIST OPTIMIZER™ – PROSPECT**

When Oceanos engaged with the customer, they first asked for a definition of a “qualified prospect.” Surprisingly, the customer didn't provide a description - company size, industry, buying authority – instead, they handed Oceanos a list of 350 companies. These companies, primarily Fortune 1000 Original Equipment Manufacturers (OEMs), represented both net new business opportunities and accounts where the customer had a history of small sales but no substantial activity. In addition, most of these accounts were clients of the customer's biggest competitors, and represented a valuable opportunity to increase market share. To focus on driving qualified leads from only these top tier accounts, Oceanos suggested its List Optimizer™ - Prospect solution to build a targeted rental list for the customer.

### **PROCESS – IDENTIFYING CONTACTS, SELECTING LISTS**

First, Oceanos took the list of accounts and defined the email domain extension for each. These extensions were then used as a filter against a set of historically high-performing lists, including those in the client's original core set. Using this filter and other demographic criteria, Oceanos was able to quantify, for each list, the number of contacts from the 350 core accounts. The lists were then prioritized based on available audience and historical performance.

The customer selected three of these lists, which were routed to Oceanos' service bureau to be merged and de-duplicated. This “merge-purge” process ensured that each contact was only purchased once, even if they appeared on more than one list. Next, the list was compared to the customer's house list, so that the company wasn't paying for contacts it already had.

### **RESULTS – NEARLY 350 HIGH-PROFILE, QUALIFIED SALES OPPORTUNITIES**

Using these new lists, the customer executed three campaigns over a period of eight weeks. As an incentive to respond, the customer offered free samples of featured ICs and a short technical book. Of the 29,521 total contacts receiving the email, 17.30% (5,107 contacts) opened the offer and 1.87% enforcing the client's brand with their top prospects.

## LIST OPTIMIZER™ CASE STUDY #3

### MAJOR PLM SOFTWARE COMPANY IMPROVES END USER RESPONSE AT KEY ACCOUNTS

As part of a highly segmented marketing strategy, this client was looking to target engineering and product development managers and end users with highly targeted desktop product messages. High turnover, often associated with end user contacts, however, meant that their house database of prospects was getting smaller, and responses were declining.

### CHALLENGE – DEVELOP A COST-EFFECTIVE, ONGOING DATA UPDATE STRATEGY

The growing percentage of invalid data was having a negative impact on opportunity conversion rates – both for sales of new software licenses and for upgrades. This made it hard to gauge the effectiveness of new marketing programs, and led to an increasing cost per lead as marketers had to work harder to generate a constant number of sales opportunities. Increasingly poor penetration of end users at enterprise accounts also made these accounts susceptible to competitive threats, which could result in even higher attrition rates and loss of market share. In the past, they had relied on large scale telemarketing efforts to confirm and update contacts, but this method was costly, and difficult to scale – even a one-time program targeting end users at enterprise accounts could easily cost hundreds of thousands of dollars. As a lower-cost alternative, the client purchased a database of contacts at existing accounts, with email addresses, from a well-known provider. However, email campaigns to the contacts resulted in little to no response, and a disappointing ROI.

### SOLUTION – LIST OPTIMIZER™ – CUSTOMER

Frustrated, the client turned to Oceanos. Oceanos introduced its List Optimizer™- Customer solution as a tool for identifying contacts from specific accounts on traditional rental lists. First, Oceanos reviewed the named accounts and defined the email domain extension for each. Then, Oceanos recommended a portfolio of permission-based, opt-in email lists – lists derived from engineering trade publications and user communities with a track record of strong performance in past marketing campaigns. The client selected three of these lists for a test campaign.

Using the identified email domain extensions as a filter, Oceanos worked with the data owners to pull a segment matching the client's target demographics from each list. The result was three segments of engineering and product development end users and managers from the enterprise accounts. The segments were routed to Oceanos' service bureau to be merged and de-duplicated. This “merge-purge” process ensured that each contact was only purchased once, even if they appeared on more than one list. Next, the list was compared to the client's house list, so that the company wasn't paying for contacts it already had. Finally, the cleaned lists were returned to each publication's service bureaus for deployment. Tracking was engaged on each list, so that post-campaign results could be analyzed in depth.

### RESULTS – MORE THAN 850 END USERS AND MANAGERS VIEW A PRODUCT DEMONSTRATION

Using these new lists, the client sent out a single “low risk” email promotion offering a short video demonstration of current customer

designing their product using the client's software. This email was sent one time to 21,086 total contacts. With only one email touch, 18.8% (3,957 contacts) opened the offer and 4.1% (873 contacts) watched the video demonstration. Even those contacts that didn't respond to the offer were still exposed to the client's branding, re-enforcing the name recognition with end users at high priority customers. At a fraction of the cost of a telemarketing effort, and with exponentially more results than purchasing an opt-out database, the client had found a repeatable, cost-effective, high-response method for ongoing acquisition of end user contacts at key accounts.

"The battle between competitors is being won and lost at the top of the funnel"

– SiriusDecisions, Demand Creation Facts & Figures

## ABOUT US:

Oceanos designs custom data strategies powered by business and executive intelligence to optimize sales and marketing performance. The firm's proprietary List Optimizer™ is a collective system of List Intelligence™ processes that in combination yield "smart data". The combination of unique research methodology, vast network of approved data providers, and business intelligence attributes provide sales and marketing with a continual pipeline of contact and account intelligence. The result is a robust, repeatable, demand creation engine.

To optimize campaign performance, Oceanos' Data Asset Management Group works closely with select clients to provide additional risk mitigation, diversification and cost certainty strategies. Oceanos clients are typically large private or public companies within the software, manufacturing, retail, business services, education, healthcare, electronics, and information services industries. Their success has placed them on the Inc. magazine fastest growing private company list three consecutive years along with numerous accolades from marketing community.

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