

DRIFT PRESS



The Go-to-Market Guide to Drift

Unify Revenue Teams, Personalize Digital Experiences, and Shorten Your Sales Cycle with Drift's Revenue Acceleration Platform

Table of Contents

3 INTRODUCTION
About This Guide

7 CHAPTER 1
Drift for Marketing

27 CHAPTER 2
Drift for Sales

38 CHAPTER 3
Drift for Customer Experience

42 CHAPTER 4
Drift for Operations

57 CHAPTER 5
Final Thoughts & Additional Resources

INTRODUCTION

About This Guide

Imagine a world where people are free to have conversations with any business, at any time, on their terms.

Imagine it was as easy to buy business services and products as it was to order food from your favorite restaurant on UberEats or watch a movie on Netflix.

Sounds nice, right? Your buyers think so too.

Hi there, we're Drift.

And we're on a mission to make business buying frictionless, more enjoyable, and more human. We connect companies with buyers and customers in real-time via [chat](#), [video](#), [voice](#), or [email](#) to help build trust and [accelerate revenue](#) with our Revenue Acceleration Platform.

If you're here, you probably have questions like:

- **What is Revenue Acceleration and how can it help my team?**
or
- **How can my company make the most of our Drift platform now?**

Well, this book has the answers – whether you're evaluating if Drift is right for you or you want to get more out of your Drift platform. In this comprehensive guide, you'll discover how to bring your go-to-market teams together with Drift to deliver personalized customer experiences.

By the end of this book, you'll learn:

1. What [Revenue Acceleration](#), [Conversational Marketing](#), and [Conversational Sales](#) are and how they can help your business increase revenue, shorten your sales cycles, and strengthen your brand experience
2. How to use Drift's Revenue Acceleration Platform to drive success across teams like marketing, sales, customer experience, and operations
3. Best practices from Drifters when using Drift for demand generation, digital marketing, sales, and account management

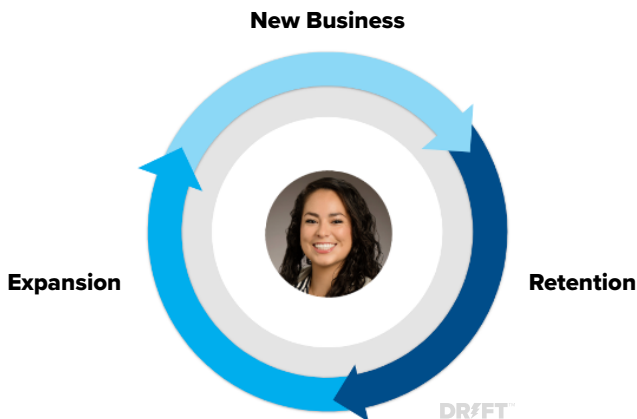
What is Revenue Acceleration?

Over the last few decades, marketing and sales have been defined by three eras, each shaped by the technologies and trends of that time:



Today, we’re in the **Revenue Era**. In this era, buyers are in control, the best customer experience wins, and digital and real-time engagement are no longer nice-to-haves. They’re business-critical.

Buyers today expect the same personalized, self-service experience they get from B2C companies – like Amazon, Netflix, and Uber – in their business buying. To be successful, your revenue teams need to work together to deliver exceptional digital experiences across the entire customer lifecycle – from acquisition to renewals to expansions. And that’s where Revenue Acceleration comes in.



Revenue Acceleration combines **Conversational Marketing** and **Conversational Sales** to create personalized, engaging experiences for buyers. Drift does this by connecting buyers and sellers instantly across digital channels. We also help facilitate quality sales conversations and scale them via our patented **artificial intelligence (AI)** technology.

Skip Ahead to Learn More About Conversational Marketing & Sales

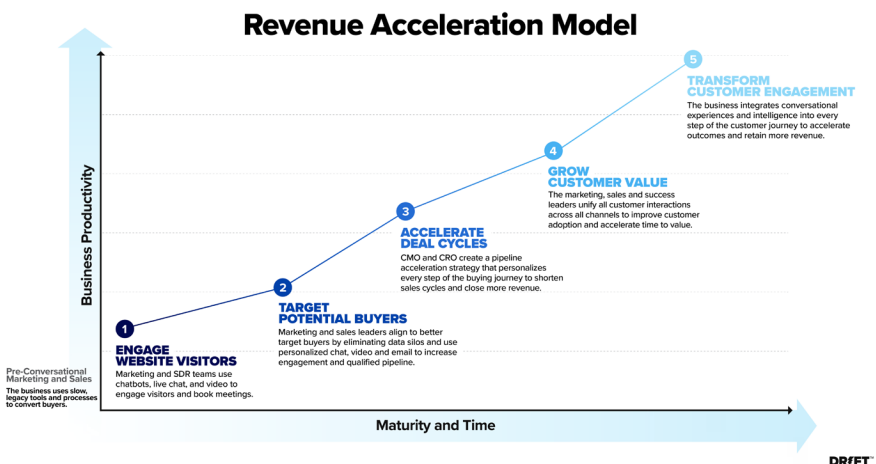
Looking to dive straight in? Learn more about two key Revenue Acceleration solutions here:

- [Conversational Marketing](#)
- [Conversational Sales](#)

How to Become a Revenue Accelerator

Whether you're deciding if Drift is right for you or you use Drift right now, we're all looking to accelerate revenue and create better buying experiences.

To help our customers do that – and to understand where they are on the path to Revenue Acceleration – we use our Revenue Acceleration Model.



This model helps customers create solutions and use cases for their business over their first three years with Drift. We also use this model to determine how to deploy Conversational Marketing and Conversational Sales.

To be clear, this is not a linear model. We don't recommend you go from one to two to three and so on. Life isn't that simple. You can start at the stage most appropriate for your business (based on your goals and challenges).

The model is focused on the following outcomes:

- **Stage 1:** Generating more meetings and leads
- **Stage 2:** Creating qualified pipeline
- **Stage 3:** Generating revenue and making sales reps more productive
- **Stage 4:** Growing customer adoption and expansion opportunities
- **Stage 5:** Growing customer retention and brand loyalty

Each of these outcomes rolls up to marketing, sales, and customer experience teams and drives value across the customer lifecycle.

Aligning revenue teams around customer lifetime value creates a more cohesive [go-to-market strategy](#), a better customer experience, and higher profitability. In fact, researchers from [SiriusDecisions](#) found that companies that align their revenue teams experience 19% faster revenue growth and 15% more profitability.

In the following chapters, we'll show you how to use Drift to achieve your revenue goals.

CHAPTER 1

Drift for Marketing

Your buyers and customers are now almost exclusively online. That means your digital experiences define your brand experience. To ensure your brand hits the right notes, your marketing team needs to double down on a website experience that is engaging, personalized, and scalable.

That's why so many marketers rely on Drift.

With Drift, marketing teams can not only scale personalization for all website visitors – but target key accounts and connect those interested buyers with sales, instantly.

No forms. No middle man. No complicated lead routing.

Marketers can focus on creating engaging campaigns that drive conversions and conversations, and delight buyers. We won't lie – transitioning from old-school inbound marketing to conversation-optimized marketing requires a new way of thinking. But, we're here to help.

To start, we'll show you how Conversational Marketing differs from the traditional inbound marketing process used in the past.

Drift on Drift: How the Drift Marketing Team Uses Drift

Want all the insights from this chapter and more? Check out the companion Drift Insider course for this book.

[WATCH THE COURSE](#)

What is Conversational Marketing?

Revenue Acceleration is made up of two key components: Conversational Marketing and Conversational Sales.

Conversational Marketing lets you engage with your buyers instantaneously. Instead of leaning on long forms and gated content to drive leads, Conversational Marketing is focused on connecting the right buyers with sales, at the right time, using targeted messaging and content.

Implementing Conversational Marketing is grounded in three steps, known as the [Conversational Framework](#):

1. **Engage:** Most buyers are forced to fill out long forms and wait for a response to download an eBook, sign up for a webinar, or even talk to sales. With Conversational Marketing, buyers can instantly access the information they need via chat on your website. And by integrating Drift with your CRM, MAP, or data enrichment provider, you can engage website visitors or buyers via email with personalized messaging.
2. **Understand:** This stage is all about qualifying buyers in real-time. Before Conversational Marketing, this qualification process involved complicated lead processing. But real-time conversations require real-time responses. With Conversational Marketing, you know who your buyers are and can qualify them in real-time. And with [Drift AI](#), you can automate this process across both chat and email and respond to buyers like your best SDR would, 24/7.
3. **Recommend:** Your sales team has engaged with your buyers and understands how to direct them down the right path. In this stage, using both chat and email you can:
 - **Chat/book a meeting/schedule a demo:** Connect buyers with the right sales reps using a seamless integration to their calendars. Or have your sales team engage with buyers instantly via chat.
 - **Nurture buyers further down the funnel:** Buyers aren't always ready to talk to sales. Use chat to navigate these buyers to the next best step – that could be a solutions page, eBook, webinar recording, or support page.

The Conversational Marketing Framework is fundamental to getting the most out of Drift's Revenue Acceleration Platform. With it, marketing leaders can solve some of the greatest challenges facing their teams. And demand generation, digital, and ABM marketers can drive more conversions from their marketing campaigns.

Become Conversational Marketing-Certified (For Free)

Grow your Conversational Marketing expertise and level up your resume with Drift's Conversational Marketing Certification.

GET CERTIFIED

How Conversational Marketing Solves the Challenges Facing Today's Marketing Leaders

Marketing leaders, especially [CMOs](#), are typically focused on four main goals:

1. Building a great brand and customer experience throughout the customer lifecycle
2. Driving more revenue from marketing spend
3. Partnering seamlessly with sales during go-to-market
4. [Measuring and communicating](#) their team's success to the company, c-suite, and board

Drift works not only across your marketing team, but enables your entire go-to-market organization to accelerate revenue and improve ROI, all while offering a great digital experience to buyers and customers. Plus, we offer [training and learning](#) resources for your team so they can become Conversational Marketing experts.

Drift also integrates with your existing marketing tech stack. Not only does this reduce additional marketing spend, but it gives marketing leaders confidence in the data and results they see from Drift.



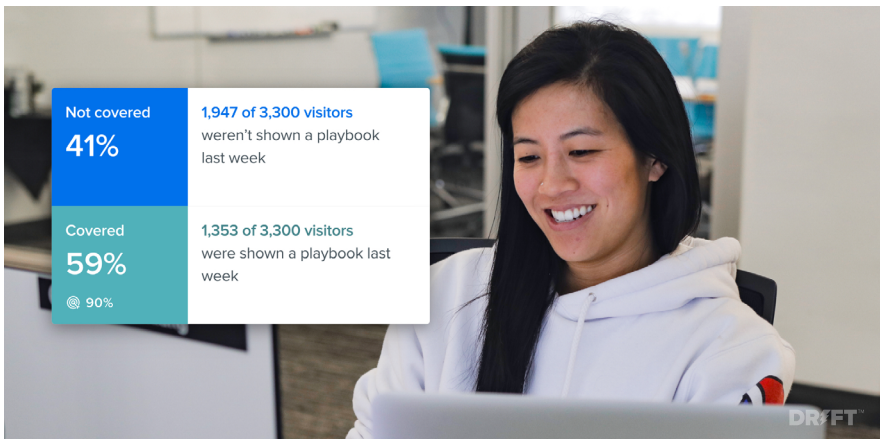
Drift for Digital Marketing

Digital marketers are the maestros of your website. It's their job to optimize your digital experience and landing pages to drive conversions. They also develop the [chat playbooks](#) and strategies for your campaigns and other digital initiatives. Here's how these marketers can get the most out of Drift:

Understanding Your Audience

Knowing “who” you are talking to is critical to starting meaningful conversations that drive opportunities.

Digital marketers use [Drift Audiences](#) to identify which pages are getting the most traffic, how many of your site visitors you're engaging with, and how many of those people are converting into leads.



With this information, marketers can determine what pages need more coverage from your playbooks to increase website engagement.

Your audiences

Showing Top audiences ▾ Sorted by Not covered (High – low) ▾

| Type | Audience | Visitors | Not covered | Covered | Conversations | Meetings |
|---|---|----------|----------------|-----------------|---------------|----------|
|  | Homepage visitors URL audience | 20,109 | 0 0% | 20,109 100% | 581 2.8% | 17 |
|  | Pricing page URL audience | 15,175 | 0 0% | 15,175 43.2% | 1,016 6.7% | 41 |
|  | Campaign: Widget-referral Drift Intel audience | 12,161 | 4,060 33.3% | 8,101 66.6% | 618 5.0% | 2 |
|  | 1,000-5,000 employees UTM audience | 5,347 | 3,099 57.9% | 2,248 42.0% | 381 7.1% | 8 |

Digital marketers can also connect Drift Audiences to [Marketo](#) and [Pardot](#) to see which target accounts are landing on your company's website and if they're engaging with your playbooks. This is a great way to ensure you're tailoring your digital experience for buyers.

Customizing Messaging Based on Buyer Journey

Not all website pages are created equal. If a buyer spends more time on, say, a pricing page, that could mean they are evaluating your business and may wish to speak with sales.

Reaching out to buyers when their intent to buy is highest is critical to increasing conversions from website traffic and marketing campaigns.

But what you say in these moments is important too. You want to develop the right messaging based on where buyers are in their journey.

Using Drift as the glue can help tie all of your campaigns together and make it so the conversation never skips a beat. If a buyer engages with one of your emails and comes back to the website, then you can greet them and say, 'I'm glad that email caught your eye. Let's keep this conversation going.' That's when you can present a piece of content or get them over to sales.



— Tim Ozmina, Senior Conversion Marketing Manager

Using the [Conversational Marketing Framework](#), you can develop messaging use cases for different touchpoints in the buyer's journey. These use cases can include playbooks, emails, and video messaging.

Let's look at a few playbook use cases. At Drift, we use the term "playbook" to refer to different types of bots you can set up in the backend – from the commonly used chatbots to the [conversational landing pages](#).

Become a Drift Playbook Pro (For Free)

Creating Drift playbooks is equal parts art and science. To help our customers develop high-converting playbooks of their own, we created the quintessential playbook certification.

GET CERTIFIED

Engage with Website Visitors

Having a standard chatbot greet visitors is a great way to deliver a more personalized digital experience. The [Engage All](#) use case can be thought of as your "default" website experience. It's your go-to playbook when other high-priority use cases like a pricing page don't apply. You can tweak and refine this use case for different pages, such as your blog or solutions pages.

Your goal with this use case is to engage visitors quickly and kickstart a conversation with them. The copy you use needs to jump out and grab their attention.

Here are some ideas you can use for a chat playbook:

- Hey there 🙋 Can I ask you a quick question?
- Hey, {insert company}! Can I help you find something?
- Want to know something cool? 🤖

Target Ideal Buyers

The “Engage All” use case is about casting a wide net and starting conversations with your website visitors. The [Target Ideal Buyers](#) use case is about targeting specific buyers with a more personalized experience. These buyers could be target accounts from an ABM campaign or visitors showing signs of buying intent.

The goal of this use case is to engage potential buyers quickly and connect them with the right sales rep. Here’s a list of eye-catching openers you could use for a chat playbook:

- Hey [Company Name] 🙌 Glad to have you here! Want to speak to a human right now?
- Hey [Company Name] Welcome to [Site Name] Can I ask you a quick question?
- Hey [Company Name] 🙌 Welcome to [Site Name]! Any questions? I can help right here!

Accelerate Deal Cycles

The [Accelerate Deal Cycle](#) use case delivers deeply personalized experiences tailored to individual buyers. You’re looking for people coming to your website in a buying mindset, and you’re helping them find answers, support, or products and services as quickly as possible.

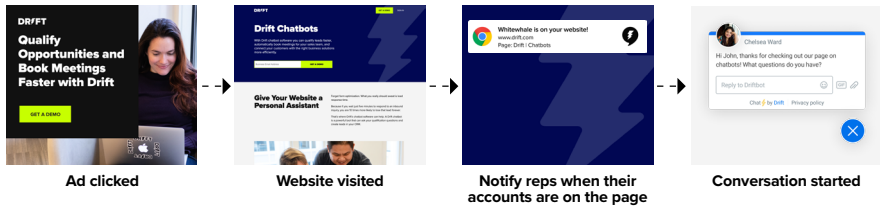
Using [Drift’s patented AI](#), you can make sure that your buyers’ questions are answered the moment they have them, without wasting time or investing too much of your team’s time. AI lets you be available to your customers 24/7. And best of all: You can train them to respond just like your best SDRs would.

With this type of chat playbook, your bot can step in and handle all frontline interactions – from answering qualifying questions to booking meetings for your sales team.

Increasing Marketing ROI From Digital Advertising

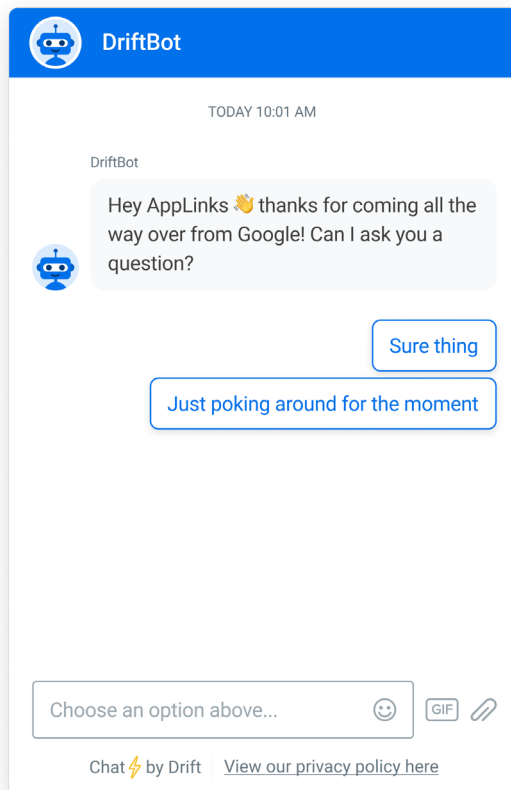
If you’re using [digital advertising](#) to drive people to your website and offers, it’s important to optimize that experience as well.

Drift improves conversion rates on your website by making it easy to retarget and customize digital advertising experiences for your paid visitors. Whether buyers land on your website from a LinkedIn banner ad, Instagram ad, or Twitter post, you can make sure they receive an experience tailored to them and their journey.



Once that buyer comes to your site and starts a conversation, you can leverage Drift's two-way integrations with CRMs and marketing automation platforms (MAPs) to customize messaging without the need to create more landing pages. All the while updating your MAP with information from each engagement and nurturing buyers effectively on other channels.

This also allows you to greet target accounts by name. Then, you can use UTM parameters to customize chat messaging based on the source channel. For example, if a VIP buyer comes in from a Google search ad.



You can also use [Drift Intel](#) to further personalize conversations with buyers, and route qualified leads to the right sales rep based on account information region, company size, and more.

As digital spaces and platforms grow in popularity, it's necessary marketers focus on ways to stand out. Using Drift, digital marketers can easily scale personalized messaging, create engaging website experiences, and convert more opportunities from web traffic and campaigns.

How WebPT Used Drift to Triple Monthly Chat Leads & Boost Advertising ROI

Learn how WebPT tripled monthly chat leads and increased MRR for paid Google and Bing ads – with Drift.

[READ WEBPT'S SUCCESS STORY](#)

Drift for Demand Generation

Digital marketers partner with [demand generation](#) to create high-impact campaigns that delight buyers. But demand gen is responsible for strategizing the messaging and tactics around those marketing campaigns to grow pipeline.

Here's how to use Drift to execute integrated campaigns across your marketing channels:

Driving More Conversions from Integrated Marketing Campaigns

[Integrated marketing campaigns](#) are the foundation of your marketing strategy. They encompass the narratives, campaigns, and offers marketing runs to grow pipeline.

Demand gen marketers invest a lot of time and energy executing these campaigns. So they must be optimized for conversions.

Drift allows you to maintain a consistent experience across the programs of your integrated marketing campaigns by seamlessly integrating with your existing tech stack.

What I love about Drift is that it helps us tie our experiences across all different lanes. So if we think about an integrated campaign, what we're really thinking about is the specific journey that we're taking our prospect on. Whether it's from one webinar to an eBook to a virtual event, we want to make sure all of those experiences are tied together.



— Matilda Miglio, Sr. Demand Generation Marketer

Here are the different ways demand generation marketers use Drift to support campaigns offers:

Leveling Up Your Webinar & Event Experience

Virtual events grew in popularity as much of the world was forced to work from home in 2020. And 93% of marketing leaders plan to continue hosting [virtual events](#) in the future.

Drift supports two major use cases for marketers looking to drive more registrations and engagement from webinars and events:

- **Event and webinar registration:** Increase registration for (physical and virtual) events and webinars with a seamless chat experience. [Learn how Celonis grew event attendance by 7X.](#)
- **Event engagement:** Integrate Drift with a virtual event platform, like ON24 or Goldcast, to engage with attendees during a live event and book meetings for your sales team. [See how Drift starts conversations during virtual events.](#)

Get Certified in Virtual Events with Drift

Learn how to run a full-fledged virtual event from the event experts here at Drift.

GET CERTIFIED

Generating More Conversations & Conversions from Content

Gating content behind long forms and workflows is a poor buyer experience – and could hurt your conversion rates. Using Drift chatbots, you can make it easy to download offers, like eBooks, while someone is on your website.

Buyers can ask questions before downloading content via chat. And with Drift's **Conversational Content**, they can also chat while consuming the content too. You can engage with buyers while their intent and interest are at their highest.

About Seattle (SE1-Lynnwood)

Our portfolio includes 31 Data Centers across 4 continents, 11 countries and 25 markets. Our centers are designed to deliver high standards of reliability including redundant power, cooling and dual rail connectivity and have historically met or exceeded 99.999 percent availability. With over 18 years of data center operational experience and our commitment to excellence you can be confident in selecting Evoque Data Center Solutions™ as your colocation partner.

LOCATION

17300 Highway 99
Lynnwood, WA 98037

Data Center Brief

PROFILE

Data Center
Overall: 100,000 sq. ft.
Racked Floor: 62,345 sq. ft.
Office Space: Customer shop in cabinets
Data Area: Subaru / Rascal
Seismic Zone: 2
Built: 1985

AMENITIES
Customer Lounge: Yes
Conference Room: Yes

TRACER INFORMATION
N/A; N/A; 401-741
CALL CODE: LYNNWOOD3
POP: 100,000 / 100,000
Camera: AT&T, Frontier, AdvancedData, CenturyLink

BUILD OUT

Types: Cage, Isolated cabinets
Racked Floor: 411
Racked Floor Level: 100 sq. ft. / sq. ft.
Sub Floor Level: 100 sq. ft. / sq. ft.
Cross Connect: Copper, fiber, coaxial
Remote Node: 24x7
Loading Dock: Yes

FIRE PROTECTION

Fire Alarm: VESDA Smoke Detector and Conventional Addressable Fire Alarm System

Fire Suppression
Data Center Areas: 70-lb. Halon dry gas
Non-Equipment Areas: Wet sprinkler

evoque
data center solutions

Lynnwood, WA (SE1) Data Center Brief

Hi there! Any specific questions I can answer about our Data Center in Lynnwood, WA?

Can I talk to sales?

I'd like a copy of the brief.

What's the data center's address?

Choose an option above...

Create Interactive Experiences Like Lessonly

Learn how Lessonly used interactive experiences to drive conversion to demos by 400%.

[READ HOW THEY DID IT](#)

Measuring the Impact of Your Campaigns

If you put a lot of time and effort into strategizing campaigns, you want to know if they're performing well.

With Drift Audiences, you can see which campaigns are driving people to your website – and what buyers do once they land there.

| | | | | | |
|-----------------------------------|-----|--------------|------------|-----------|--------------|
| meetings-referral UTM campaign | 235 | 119 50.6% | 23 9.8% | 1 0.4% | 116 49.4% |
|-----------------------------------|-----|--------------|------------|-----------|--------------|

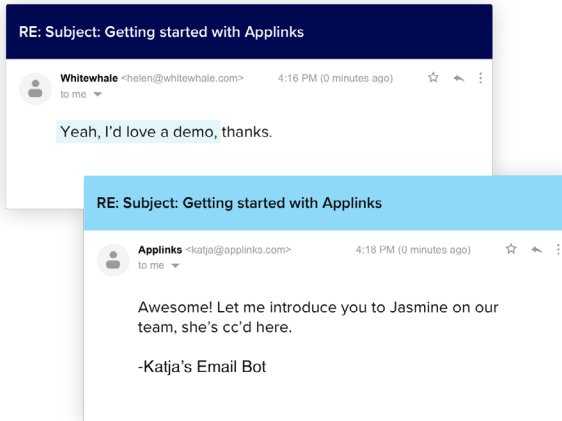
This will help determine which campaigns need to be optimized and which are successfully pushing buyers to your website.

Creating More ROI From Email Marketing

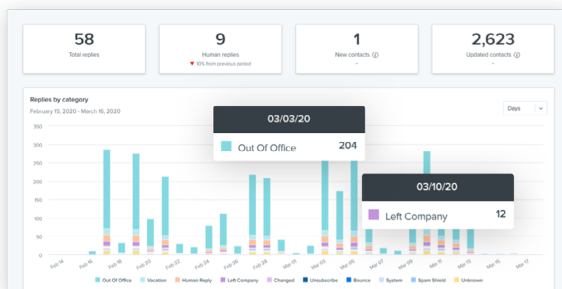
Successfully personalizing email centers around a few key areas: who you're writing for, their pain, and how you can help them solve it. A truly personalized email experience is conversational.

With [Drift Email](#), demand generation marketers can:

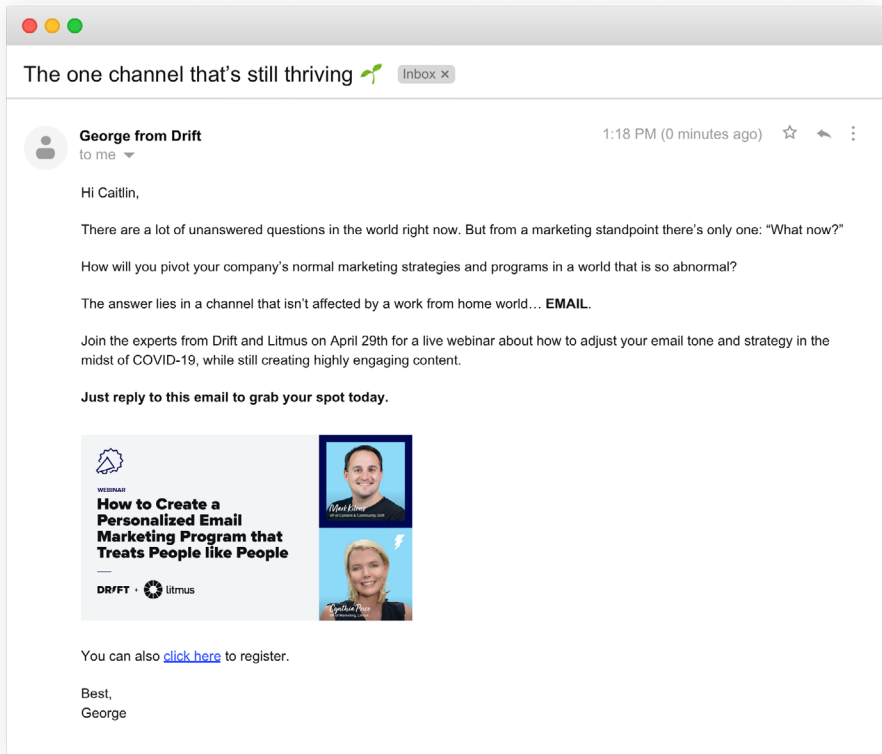
- **Start and manage email conversations to keep the experience conversational and simple.** At Drift, we use emails to let customers and prospects easily register for webinars and virtual events with a simple “yes” or “no” response.



- **Separate human responses from automated responses to book more meetings and make follow-up easy.** Easily route human responses that require a personal answer to the account owner on your sales or customer success team, making sure they are addressed quickly and effectively.



- **Automatically clean and enrich contact records for a database that's always up-to-date.** Database hygiene is simple when your email system can enrich your CRM for you with changes in email, title, location, etc.



The Ultimate Email Marketing Toolkit

Learn how to create a show-stopping email marketing program that sparks conversations and drives conversions with Drift's high-performance email marketing toolkit.

GET THE TOOLKIT

Drift for Account-Based Marketing

Account-based marketing (ABM) is a form of marketing that uses highly targeted, personalized campaigns to win over key accounts.

It starts with creating a list of high-value accounts and then rolling out the red carpet to give buyers a VIP experience – across your website and in every engagement you have with them.

This high degree of personalization results in more meetings and conversations for your sales team. But a personalized approach like this can get expensive and time-intensive. With **Drift ABM**, ABM marketers can easily personalize website experiences for target accounts and connect contacts to their assigned reps.

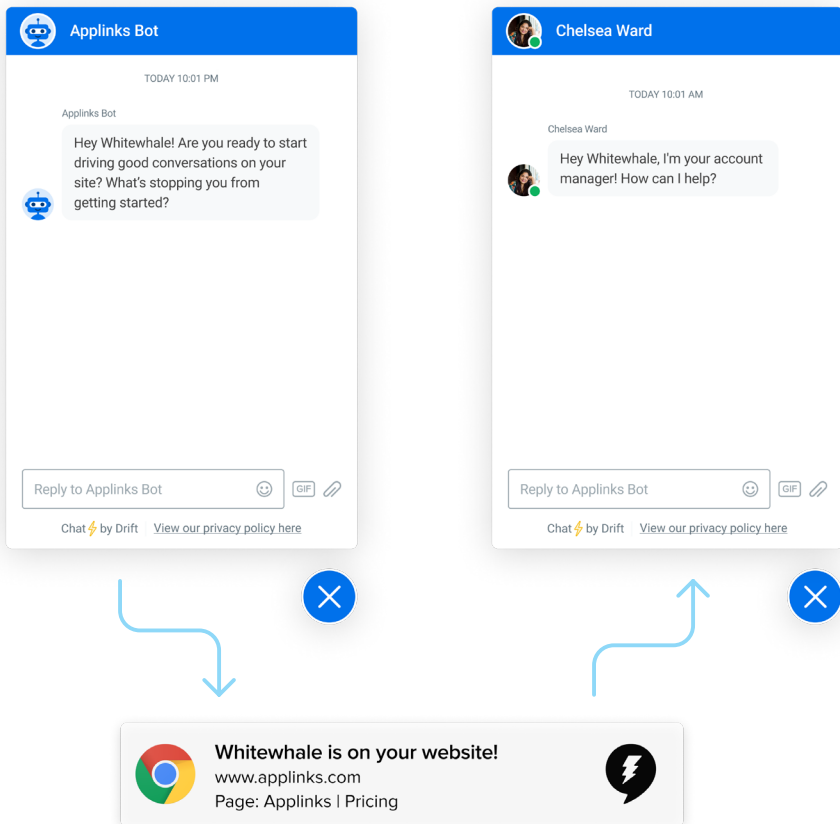


Connecting Target Accounts to Sales

Marketing's job doesn't end after bringing high-value visitors to your website. You also need to partner with sales to convert those VIP buyers into customers.

By integrating Drift with your MAP or using [Drift Intel](#), you can reach out to contacts from target accounts with personalized messaging. You can then notify the right rep that their target account is on the website, so they can jump in and engage. And if your sales rep isn't available, no problem. With [Virtual Selling Assistants](#), your AI chatbot can book meetings and demos for your sales reps (even while they're sleeping).

Once you've set up your Drift workflows, you can start developing ABM campaigns and use Drift across key touchpoints.



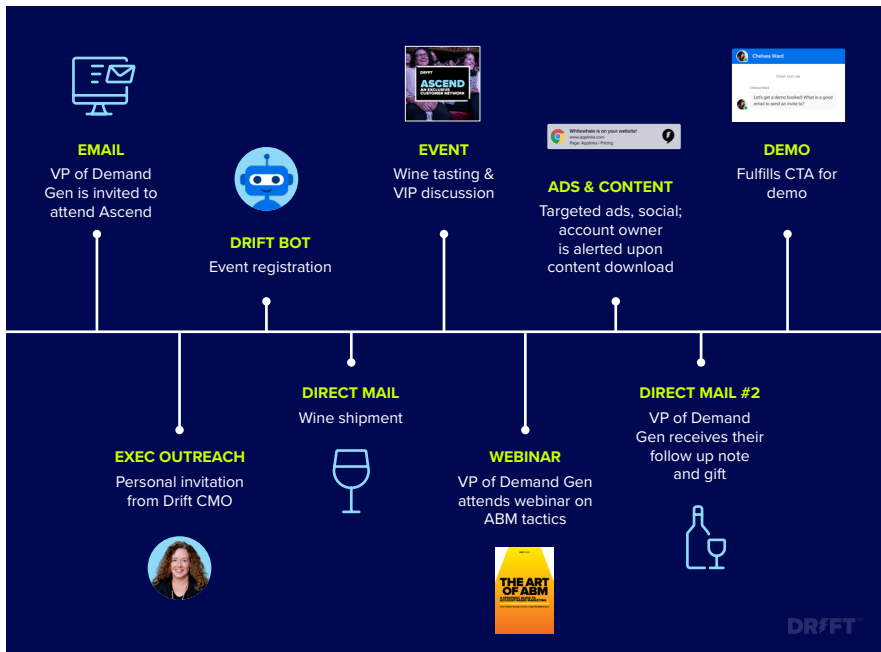
Developing a Personalized ABM Campaign Experience

Marketing spends an incredible amount of money driving buyers to your website. The last thing you want is for these high-value buyers to get a generic website experience that causes them to drop off.

At Drift, for example, we use our platform to create a personalized experience for virtual event attendees at Drift Ascend.

Before registering, target buyers and customers receive a personalized email invite from our CMO. They are then able to seamlessly register for the event via a Drift chatbot, where we also recommend other relevant content to them.

The event itself is intimate and facilitates conversations between our buyers and customers. Following the event, attendees continue to receive targeted ads. Anytime they visit the Drift website, their account owner is notified.



Scaling personalization with Drift reduces costs, drives conversions, and delights future customers. It's also a great way to create better alignment between revenue teams – as you saw in our example.

Learn More About the Drift Solutions Mentioned in This Chapter

- [Drift Audiences](#)
- [Drift Intel](#)
- [Drift Chatbots](#)
- [Drift Email](#)
- [Drift ABM](#)
- [Drift Virtual Selling Assistants](#)



CHAPTER 2

Drift for Sales

Today's buyers have more resources and more options than ever before. It's estimated that more than 70% of the buyer's journey is completed before even talking to sales. So where does that leave your sales team?

A sales rep's number one job is to help buyers find solutions to their pain. They're a buyer's tour guide, recommender, and trusted advisor throughout the entire buying journey.

You can no longer expect to move buyers through a complex sales process designed around your company's needs. Using Drift and Conversational Sales best practices you can create a buyer-centric sales process that people love.

Drift on Drift: How the Drift Sales Team Uses Drift

Want all the insights from this chapter and more? Check out the companion Drift Insider course for this book.

WATCH THE COURSE

What is Conversational Sales?

Conversational Sales is a more customer-centric approach to sales. Instead of waiting for buyers to come to you, you engage them on the channel of their choice – when they want to engage, and how they want to engage.

But Conversational Sales doesn't just make it easier for buyers to buy. Drift and Conversational Sales also make it easier for sellers to sell by enabling SDRs and account executives (AEs) to:

- Easily engage across channels
- Identify key stakeholders
- Focus on the activities and deals that drive revenue

Like Conversational Marketing, Conversational Sales helps sales teams:

1. **Engage** with buyers on their terms when their attention and intent are at their highest.
2. **Understand** buyers by asking questions, tapping into intent signals, and using other sources of data to know what they care about and why they should purchase your product.
3. **Recommend** what's best for the buyer to educate them, build trust, and help them buy.

Become Conversational Sales-Certified (For Free)

Grow your Conversational Sales expertise and level up your resume with Drift's Conversational Sales Certification.

GET CERTIFIED

Drift for SDRs & Sales Prospecting

SDRs are the bridge between marketing and sales. They work with marketing to follow-up on campaigns, align with AEs on buyer research, book meetings for reps to turn conversations into opportunities, and a whole lot more.

SDRs also hear a lot of “nos” throughout their day. This means the more of a competitive advantage you can give them, the better.

Here’s how your SDRs, BDRs, and frontline sales team can use Drift to break through the noise to engage and delight buyers:

Engaging Website Visitors in Real-Time with Live Chat

Your team is most likely prospecting into accounts through a combination of [emails](#), phone calls, and LinkedIn outreach. All three motions require you to wait for someone to respond. So you want your SDR team ready to do just that – respond to buyers when they’re ready to talk to you.

[Drift Live Chat](#) gives SDR teams a way to interact and engage with prospective buyers in real-time. Live chat instantly notifies reps when a target account is on your website. If a rep is not available, Drift can book a meeting for them. If they are, then they can jump in and start a conversation via chat or take a call with [Chat to Call](#) and [Chat to Zoom](#). Whatever your buyer prefers.

As an SDR, the one thing that will interrupt any task that I’m doing – and always takes priority when it occurs – is a Drift chat notification. It’s really the only channel that is instant, quick, real-time, and connects me to the customer live.



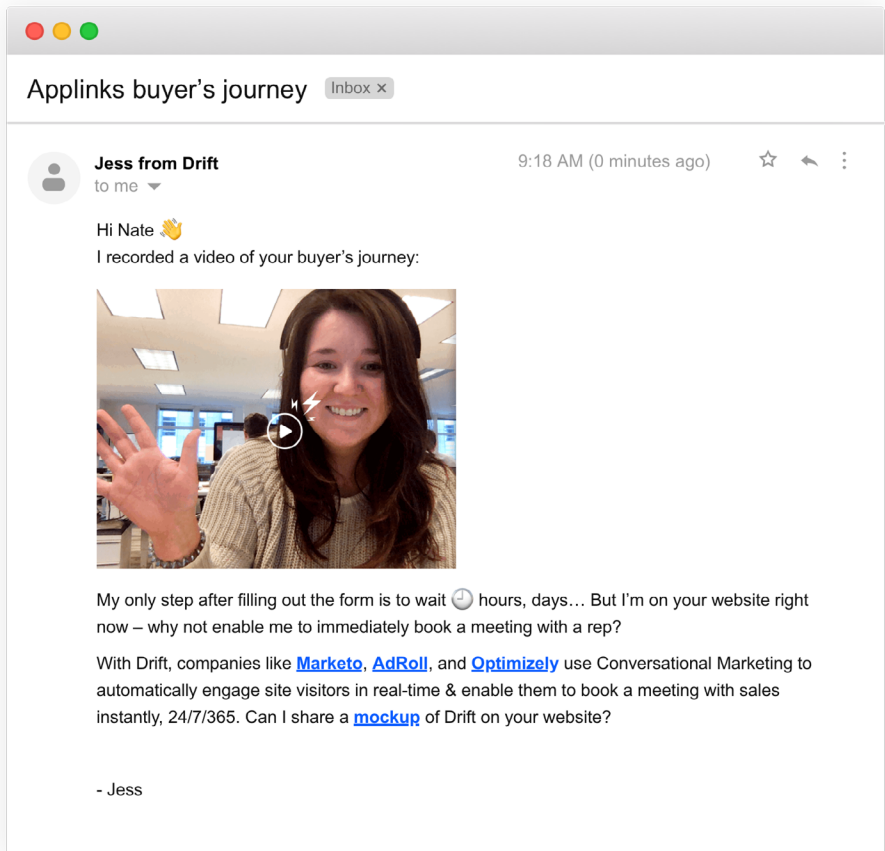
— Tate Knapp, Sales Development Representative

Personalizing Sales Prospecting & Outreach

Breaking through the noise of a buyer's inbox is hard work. That's why it pays to get creative in your [cold outreach](#) and [sales prospecting](#).

[Drift's target account tracking](#) and [Drift Video](#) are two powerful features SDRs use to engage and delight buyers through personalization. With Drift's target account tracking, you can identify how active a contact is from a target account and what content they engaged with.

Using that information you can write a short, personalized email or LinkedIn message, and embed a Drift Video.



Asynchronous videos help convey big ideas in a succinct format – and humanize sales outreach. They're also ideal for ice breakers and prospecting:

I use Drift Video non-stop. Many of my SDR friends were in awe of the fact that we use Drift Video. It's a super new way to prospect. It's not used by a lot of organizations, which makes an impression that breaks through the noise.



— Madison Barnett, Sales Development Representative

Drift Video isn't Just for SDRs

Learn how a Flywire account executive used Drift Video to personalize her outreach.

[READ FLYWIRE'S STORY](#)

Drift for Deal Management & Acceleration

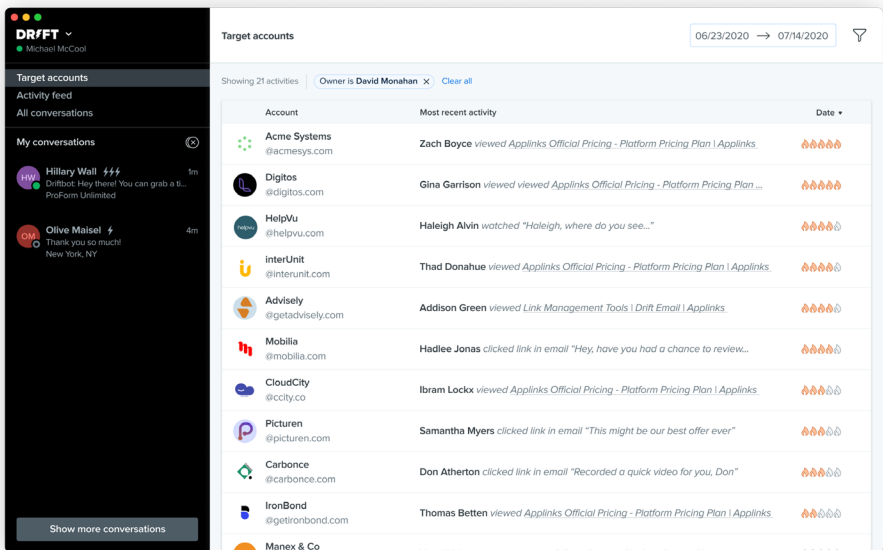
There are a lot of activities, accounts, and overflowing inboxes competing for your sales team's attention on any given day. You want to give them an easy way to identify target accounts, engage with them, and move them down the funnel.

Whether it's identifying decision-makers, crafting the perfect outreach, or responding to high-value accounts in real-time, your sales team can use Drift to manage deals and accelerate revenue.

Identify Your Buying Committees & Prioritize Target Accounts

Most buying journeys are messy. Today, most B2B [buying committees](#) have between six to 10 decision-makers. This means you need to sell to multiple personas and customize your message for each person.

[Drift's target account tracking](#) helps your sales team be more productive by engaging the right people at the right time. Drift's target account tracking automatically prioritizes target accounts, centralizes insights on behaviors across the buying team, and gives direct access to follow-up – all from a single interface.



Here's how Drift's target account tracking can work for you:

1. **Prioritize your target accounts** based on a comprehensive engagement score. Drift's target account tracking brings together information about how often contacts are engaging with you, what they are engaging with, and how recently they engaged with you to create a score that lets you easily identify your most engaged accounts.

2. **Identify decision-makers** so you know who to reach out to, who is most interested, and who is currently on your website.
3. **Know what to say** in each conversation based on a contact's LinkedIn profile, Salesforce history, past Drift conversations, and what content a buyer already consumed.
4. **Capitalize on buyer intent** by taking action quickly when a buyer has expressed interest or intent to buy.

With an enterprise customer, there aren't just one or two decision-makers. There are seven or eight people involved in making a decision. I want to be able to identify what content they're engaging with. I want to be able to craft my outreach, not only based on that content, but also where they are in the buying cycle. That establishes me as a credible resource for them as they go through their buying journey.



— Sean McGowan, Enterprise Sales Representative

Steal Drift's Selling Secrets

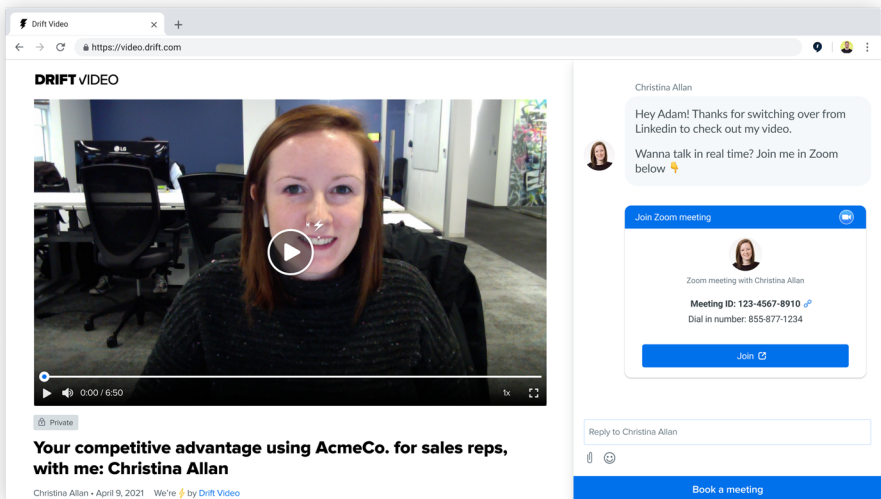
Want to see how Drift's sales team uses Drift to exceed quota and accelerate deals? Check out Drift Selling Secrets, a comprehensive guide on how we use Drift to grow our sales revenue.

DOWNLOAD YOUR COPY

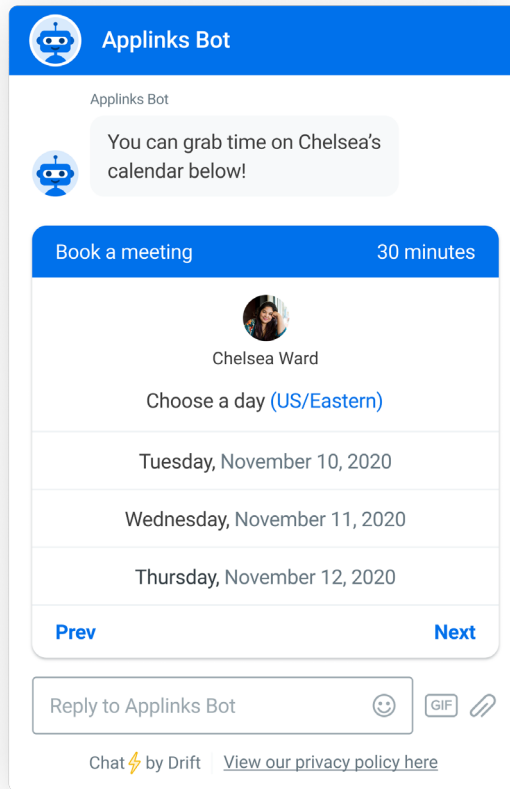
Engage with Target Accounts

As a sales rep, you want to reduce the amount of back and forth with your buyers. To do this, you need to convey information without friction and make it easy for buyers to respond.

Drift Video helps you answer complex questions in less time than it takes to type out a long email – all while adding a face to the name and helping personalize your outreach. And, best of all, the **Drift Video Bot** will notify you when someone is watching your video and let them book time on your calendar.



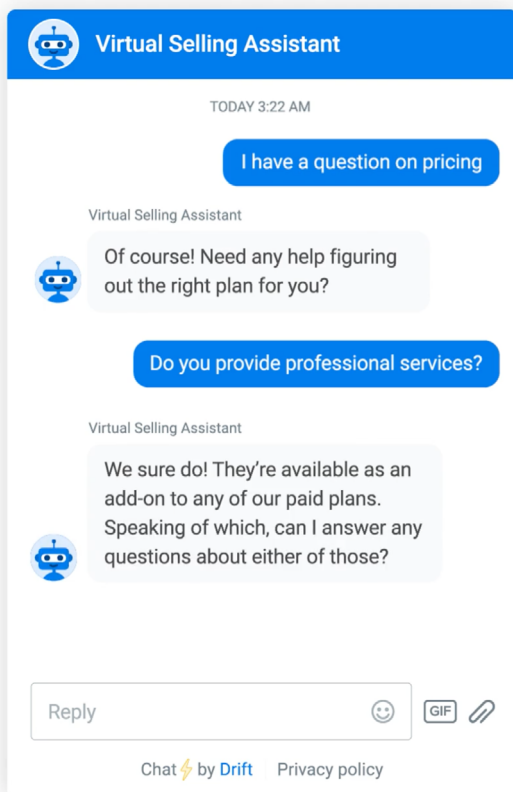
But what if a target account comes to your website? Earlier we shared how **Drift ABM** allows you to personalize chat messaging for buyers. Like with Drift Video, Drift ABM will notify sales when a contact from a target account is on your site. If those buyers want to book some time with you, you can use **Drift Meetings** to share your calendar seamlessly:



Accelerate Revenue & Scale Sales with AI

Your sales team can't always be online to have live conversations. Don't worry though. While your team is human and needs to sleep, AI never does.

Drift's Virtual Selling Assistants are AI-powered chatbots available to your site visitors at all hours of the day, in multiple languages. They act as an extension of your sales and SDR teams and are equipped to answer any questions your buyers have.



With Virtual Selling Assistants you can:

- Engage your buyers 24/7, all around the world, and answer their most pressing questions
- Qualify buyers and send only the best fits to your sales team
- Deflect support questions appropriately to save your sales team time

Want to see Virtual Selling Assistants in action? Read how Okta doubled their MQL to SQL conversion rate with Drift's patented AI [here](#).



Learn More About the Drift Solutions Mentioned in This Chapter

- [Drift's target account tracking](#)
- [Drift Live Chat](#)
- [Drift Video](#)
- [Drift Meetings](#)
- [Drift Virtual Selling Assistants](#)

CHAPTER 3

Drift for Customer Experience

Your customers have more options and access to more resources than ever before. Not meeting their expectations or delivering on your promises? They'll move on to a competitor that will.

Businesses no longer compete based on their products and services alone. In a study from [Gartner](#), 80% of businesses said their main competitive advantage is now their customer experience.

But customer retention isn't the only thing at stake here. Almost [84%](#) of B2B sales start with a referral – meaning your customer experience also impacts net new business.

With Drift, you can create frictionless digital experiences for your buyers and customers.

Drift on Drift: How Drift Customer & Account Management Teams Use Drift

Want all the insights from this chapter and more? Check out the companion Drift Insider course for this book.

WATCH THE COURSE

Leveraging Drift During Customer Onboarding

Onboarding is a critical milestone in a customer's journey. Yet, many companies fall short here. In Drift's [The State of Buyer & Customer Experience Report](#), **57% of businesses** said their onboarding process was only somewhat effective.

Respondents from this report cited poor communication and a lack of preparedness as the main culprits for a lackluster onboarding experience. And this checks out. From goal setting to training to technical setup, there's a lot to cover during onboarding.

Rather than crowd our customers' calendars with meeting after meeting, Drift's onboarding and customer teams prefer to leverage [Drift Video](#).

If a customer does prefer to meet one-on-one, it's important to give them options. With [Drift Meetings](#), customer teams can share their availability with customers instantly.

I use Drift Meetings almost every single day. It helps speed up scheduling and coordinating meetings with internal stakeholders. For example, if I need to pull in another member of my team, I can share our calendars and customers can select an available time.



— Elizabeth Glaven, Customer Onboarding Manager

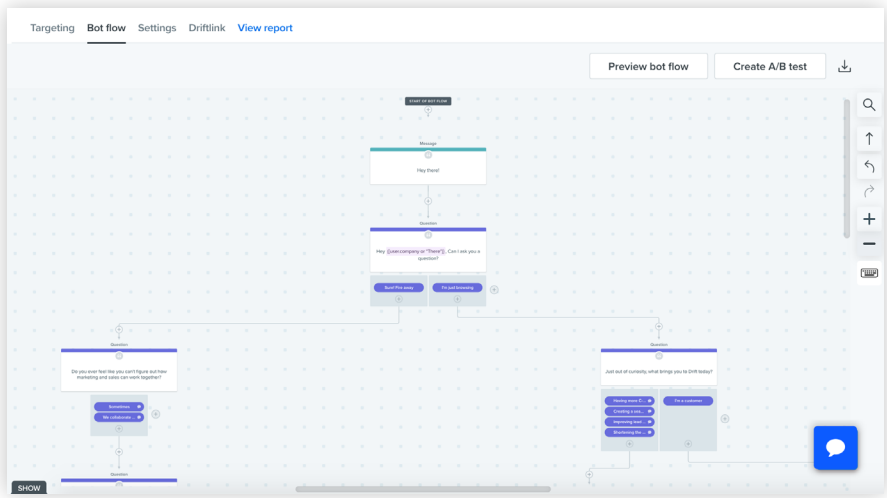
Developing an Effective Playbook Strategy

The goals set during onboarding impact your overall Drift playbook strategy. For example, if your goal is to generate more meetings and connect sales with more site visitors, we'll deploy a different playbook strategy than if we're driving people to webinars or events.

At the beginning of go-live, we encourage customers to focus on [high-intent, high-traffic pages](#) first – like your homepage or solution, product, pricing, or contact us pages.

At a minimum, we suggest customers deploy three playbooks that target three different audiences at different stages in their buying journey.

We may also focus on playbooks for specific target accounts, in addition to targeting visitors coming in from different sources. We not only want customers to walk away able to [build their own playbooks](#), but to think critically about their playbook strategy and how they can get the most value out of Drift early on.



Get Expert Help From the Drift Team

Find even more success with our dedicated team of Drift experts ready to help execute your go-to-market strategy.

[READ ABOUT DRIFT EXPERT SERVICES](#)

Expanding and Growing Accounts with Drift

Like other revenue teams, account managers (AM) want to limit the chances of a deal going dark. It's on AMs to stay up-to-date on account activity and identify value for customers.

For Drift AM Neil Fiedler, [Drift's target account tracking](#) offers a rich view of account activity, and helps him pinpoint key stakeholders and their priorities:

At least twice a day I'm checking Drift Prospector. I'm blessed to be in account management on the post-sale side. There's really rich data in there because they're our customers. Every day I'm looking in Drift Prospector at the accounts I have open opportunities with or ones that have renewals coming up. I can see who from those accounts interacted with Drift recently, and other important insights.



— Neil Fiedler, Strategic Mid-Market Account Manager

This view is key for AMs like Neil who are dealing with renewals and sourcing expansion, up-sell, and cross-sell opportunities. Plus, having a solution that spans both pre-and post-sales ensures revenue teams are working from a single source of truth.

To accelerate revenue and create long-term growth, you need to consider the entire customer lifecycle. So far we've walked through how marketing, sales, and customer teams drive value across this lifecycle. To end, we're sharing how to ensure Drift is optimized to meet your company's goals and needs.

Learn More About the Drift Solutions Mentioned in This Chapter

- [Drift Video](#)
- [Drift Meetings](#)
- [Drift's target account tracking](#)
- [Chat Playbooks](#)

CHAPTER 4

Drift for Operations

We owe a lot to our operations teams. They keep us connected. They keep our workflows functioning properly. And they ensure Drift is optimized and playing nice with our existing tech stacks.

Ops is always careful about introducing new technologies into the marketing and sales mix.

So we suspect your operations team will have some questions for us. Questions like: Where does Drift fit into my company's existing tech stack? Does Drift offer the integrations we need? What kind of support does Drift offer to help my team reach their goals?

In this chapter, we aim to answer these questions and more. Here are our best practices for operations teams evaluating, using, and optimizing Drift.

Drift on Drift: How the Marketing Ops & Sales Ops Teams Use Drift

Want all the insights from this chapter and more? Check out the companion Drift Insider course for this book.

[WATCH THE COURSE](#)

Adding Drift to Your Tech Stack

We built Drift with [integrations](#) in mind. That's why we're adding new integrations all the time and making it easy for customers to connect Drift with the tools they already have in place.

In other words, we're not here to change the way you work, but to help make your work better. It's how we think about using Drift here, and it's how we hope you see Drift fitting into your tech stack too:

One of the great things about Drift being a full platform is that we can pull data from the product into our other day-to-day tools. Being able to have Drift at the center of our tech stack – and use that to capture important data about our customers and our website visitors – is really helpful.



— Sean Lane, Director of Operations

Finally, a Podcast For Ops

In our [Operations](#) podcast, you'll hear from host Sean Lane, Director of Operations at Drift, and leading operations pros, as they go under the hood of companies like Salesforce, Amazon, and Okta to find out what it truly takes to scale operations through hypergrowth.

SUBSCRIBE TO THE PODCAST

To get the most out of Drift right away, you'll want to integrate it properly into your tech stack. Here are the high-level steps for doing just that:

1. **Look at your existing go-to-market strategy:** Before you dive into the technical stuff, think about how leads get delivered to your sales team now. Identify how leads are passed off and where Drift fits into that workflow. That way, you can build on what your team already has in place.

2. **Decide how Drift will connect to your other tools:** Drift makes it easy to connect with your key tools. To start, you want a bi-directional sync between your Drift instance and your CRM and MAP. With this bi-directional sync, you create a real-time and seamless user experience. You can learn more about Drift's two-way integrations [here](#).
3. **Meet with your marketing and sales leaders:** Meet with your marketing and sales leaders to ensure everyone comes to an agreement around what changes need to be made to your go-to-market process – and how marketing and sales will be using Drift day-to-day.

Now that you've laid your foundation, you can start layering on your additional integrations.

Integrations for Marketing, Sales, Customer Support, and More

Drift wants to support all of your revenue teams. And these teams have different tools they lean on every day. That's why we offer more than 50 [integrations](#) to support your needs, including integrations for:

- [CRM and sales engagement](#)
- [Marketing automation](#)
- [Account-based marketing](#)
- [Marketing insights and data](#)
- [Ecommerce and demand generation](#)
- [Customer success and support](#)
- [Communications](#)

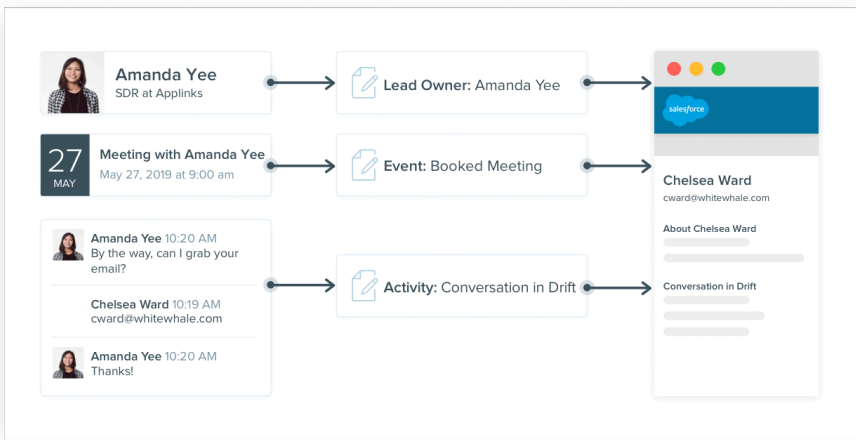
If you don't see an integration for a tool you use, no worries. [Zapier](#) can connect Drift with over 500+ popular applications. We even have [pre-built zaps](#) to make your job that much easier.

We won't dig into every Drift integration available (we'd be here a while). Instead, we'll share some common integrations our customers use every day:

Drift & Salesforce Integration

There's a lot of rich data in a Drift conversation. Insights your sales and marketing team need to target buyers and close deals.

With Drift's two-way Salesforce integration, you can sync Drift chat data directly to Salesforce. This gives your team real-time insights and lets you automatically route conversations with existing leads to the right account owners.



You can also sync people from your target accounts from Salesforce into Drift to greet VIP buyers with personalized messaging.

Finally, your Drift-Salesforce integration also comes with robust reporting features. These reports show how Drift impacts your bottom line. Drift does this by automatically syncing with opportunities in Salesforce to analyze:

- Which opportunities were influenced by Drift
- The dollar value of those opportunities
- Which Drift conversations influenced those opportunities

We'll share more details about Drift-Salesforce reporting features in the last section of this chapter.

Learn More About Drift's Salesforce Integration

Want more insight into the Drift-Salesforce integration? Check out our dedicated landing page.

[LEARN MORE](#)

Drift & Pardot Integration

Like our core Salesforce integration, the Drift Chat and Pardot integration allows you to sync contacts from Pardot into Drift for target accounts and customers. This lets you tailor your chat experience based on the buyer's journey and how they've engaged with your marketing campaigns in the past.

And because no one likes a messy database, we've also integrated [Drift Email](#) with Pardot as well. Drift Email can:

- Analyze your Pardot email replies
- Find and tag real human replies
- Sync contacts and replies to Pardot and route those emails to the assigned sales reps

Drift Email can also source new information from a sea of OOO replies, email signatures, and automated replies to update outdated contacts, add new contacts to your database, and enrich existing lead information in Pardot.

Learn More About Drift's Pardot Integration

Want more insight into the Drift-Pardot integration? Check out our dedicated landing page.

[LEARN MORE](#)

Drift & Marketo Integration

If you're running an [account-based marketing](#) program, you'll want to check out our Drift-Marketo integration. With this two-way integration, you can personalize your outreach in chat by syncing Marketo with Drift and make your existing Marketo campaigns even smarter.

Similar to the Pardot integration, Drift enriches your Marketo database with Drift chat and email insights. This creates a seamless customer experience across your different marketing channels.

Learn More About Drift's Marketo Integration

Want more insight into the Drift-Marketo integration? Check out our dedicated landing page.

LEARN MORE

Drift & Outreach Integration

How many emails does your sales team send out every week? How about every day?

A lot, we bet.

That's why so many sales teams rely on our Drift-Outreach integration.

Instead of waiting to see which buyers engage with an email, sales are immediately notified when a buyer clicks an email link and lands on your website. If the sales rep happens to be tied up at the moment, the Driftbot can provide coverage and book a meeting for them.

But what if a buyer isn't ready to book a meeting? In that case, sales can enroll the buyer in their Outreach sequence to nurture them further.

The information from your Drift chat is then synced into [Outreach's Activity Feed](#). So when a buyer does eventually jump on a call with sales, reps can reference past conversations they've had with that buyer.

Now that you've set up your key integrations, you can start reporting on how Drift is influencing your bottom line.

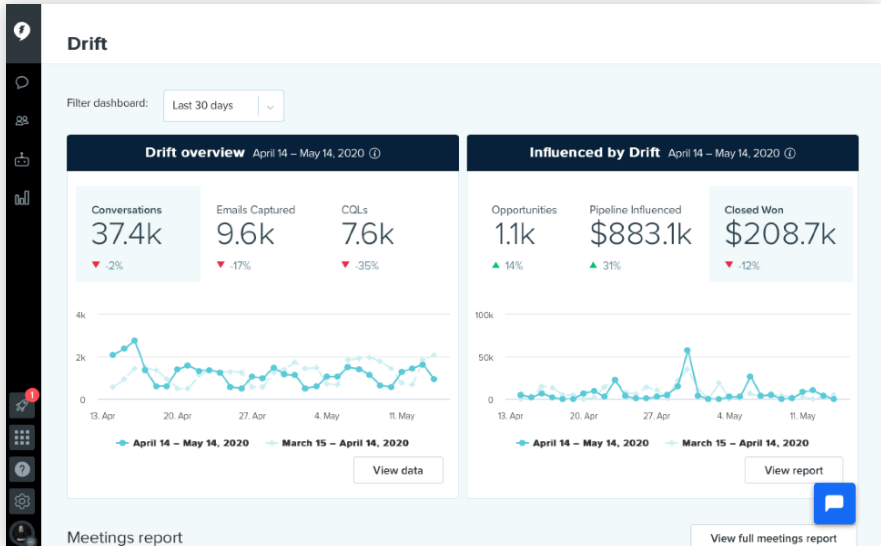
Learn More About Drift's Outreach Integration

Want more insight into the Drift-Outreach integration? Check out our dedicated landing page.

LEARN MORE

Measuring Drift's Impact on Your Business Revenue

Drift's revenue reports are powered by our Salesforce integration. With this integration you can turn on the [Salesforce Revenue Dashboard](#) and access several additional insights.



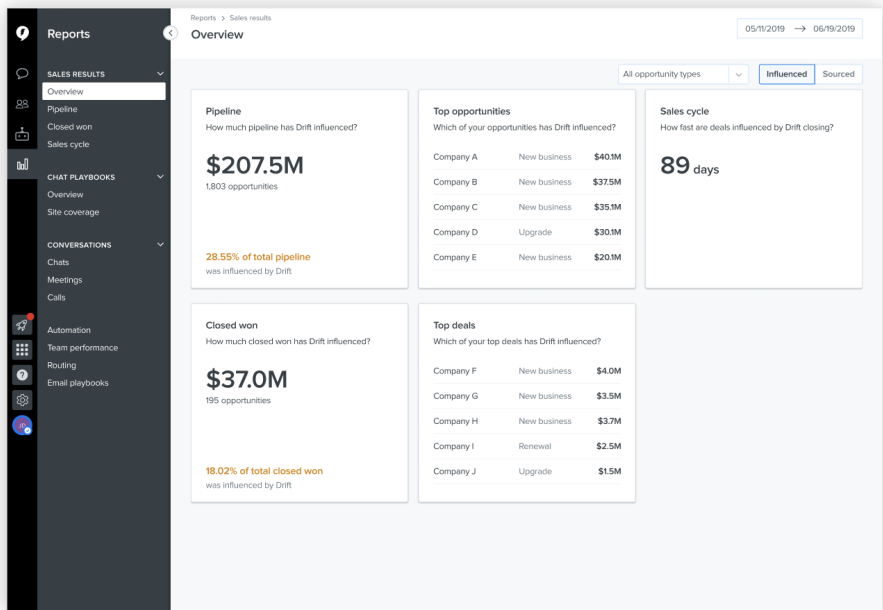
The data here covers three main metrics: opportunities, pipeline, and closed-won revenue. You can adjust the date range to see Drift's impact on these metrics over a fixed period. This can then be compared to a previous period.

If you want to dig in a bit more, you can hover over each data point to see closed-won revenue. From this dashboard, you can access four different revenue reports.

Overview Report

The Overview report is exactly what it sounds like: It provides an overview of all your revenue metrics on one page. From this report view you can see:

- The total amount of deals and opportunities
- The top opportunities by revenue
- The biggest deals Drift has helped you close
- The total revenue Drift has helped you close
- How quickly Drift is helping you close deals and revenue



You can then filter the data displayed here by influenced and sourced:

- **Influenced:** This refers to contacts from an account that interacted with your company via Drift.
- **Sourced:** This refers to the first time a contact from an account interacted with your company via Drift.

From this view, you can also access the three other revenue reports as well.

How to Use Drift's Overview Report

Watch this Drift Insider class and learn how to use Drift's Overview report like a pro.

[WATCH THE CLASS](#)

Pipeline Report

The Pipeline report identifies how much possible revenue Drift has influenced for your business. As we saw in the Overview report – and as we'll see with the other revenue reports – this information can be filtered by influenced and sourced.

You can also filter by the type of opportunity (i.e., new business, expansion). This makes it a valuable report for all three of your revenue teams.

Closed-Won

Your Closed-Won report shows exactly how much revenue Drift has helped your business close over a period of time.

Sales Cycle

Drift is all about shortening your sales cycle and accelerating revenue. And with the Sales Cycle report, you can see the average number of days between the creation and closure date of Drift-influenced opportunities.

It's so much easier to show executives the impact Drift has on our Pipeline and Closed Won revenue now that it's automatically calculated and available within Salesforce.



— Michelle Chen, RevOps Associate at [Groove](#)

Drift for Salesforce App

We want to make reporting as accessible as possible. With the Drift for Salesforce app, you can access reports and dashboards directly within Salesforce and build your own custom reports.

[LEARN MORE](#)

Tracking Your Performance with Drift

Drift offers even more insights and analytics to help you optimize your website engagement, marketing, and sales strategy.

Chat Playbook Reports

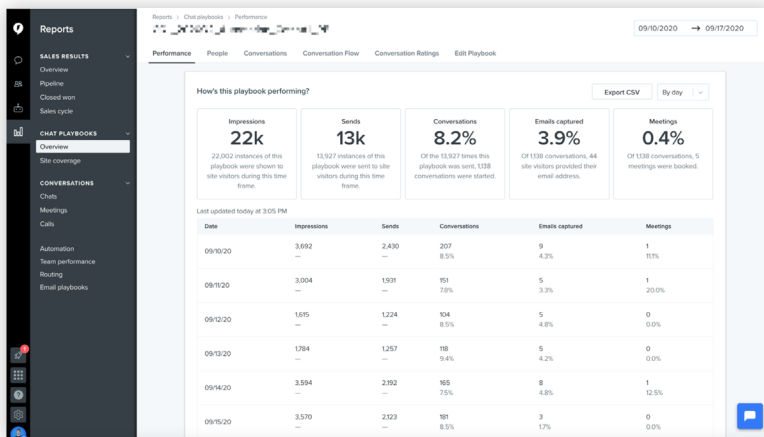
To increase the number of conversations you have, meetings you book, and leads you capture, you need to stay on top of your chat [playbook](#) performance.

[Drift's Chat Playbook reports](#) help you understand your top-performing playbooks, the coverage of playbooks on your site, and individual playbook performance. These reports cover five metrics:

- **Impressions:** The number of times a playbook is shown to a website visitor.
- **Sends:** The number of website visitor sessions where a playbook was shown.
- **Conversations:** The number of conversations started by a playbook – from clicking a button in a playbook to chatting with a bot or human.
- **Emails captured:** The number of new emails captured by a playbook.
- **Meetings booked:** The number of meetings booked in conversations that started with a particular playbook. This counts for both bot and human-booked meetings.

Two main reports fall under here: The Overview and Site Coverage reports.

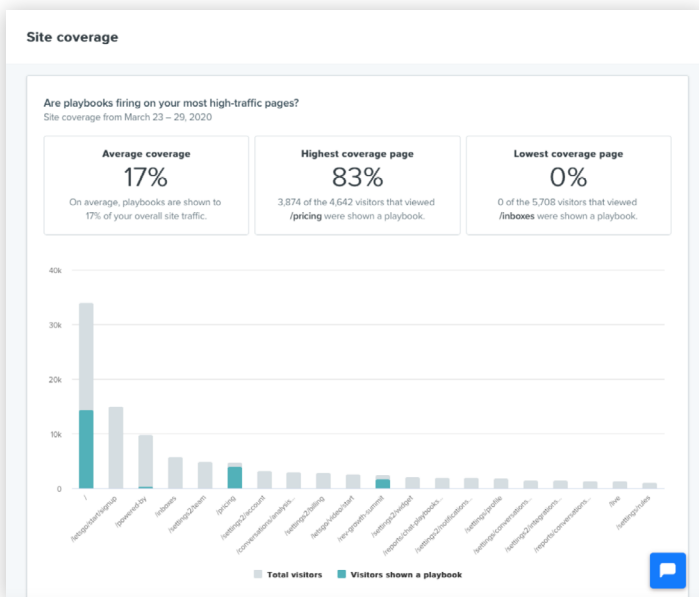
The Overview report shows the top 25 playbooks by performance on your website. From here you can dig into each playbook's performance based on the five metrics we mentioned earlier. This report will calculate your conversation rates for each playbook, making it easy to compare playbook performance.



Finally, there are several tabs located at the top of this report that let you dig even deeper:

- **People:** See what people have interacted with your playbook (both known and anonymous).
- **Conversations:** Drill down into the conversations people have had with your playbook.
- **Conversations Flow:** See the different paths people took with your playbook. This is useful for identifying where drop-offs in a bot conversation might be happening.
- **Conversation Ratings:** There's an option to turn on "conversation ratings" for your playbooks. With this feature, website visitors can rate their experience with a bot or human they interacted with for a particular playbook. We'll look at this more under Conversations reports.

The [Site Coverage](#) report shows the average playbook coverage on your website, the highest covered page, and the lowest covered page. You can then drill down into those pages and see the total amount of visitors per page, the total amount of visitors who have been shown a playbook, and the number of playbooks firing on each page.



Conversations Reports

Conversations reports show the conversations your team has had with buyers and customers. Here you can analyze bot conversations, human conversations, or all conversations.










There are five different reports found under here: Chats, Meetings, Calls, Team Performance, and Routing. These individual reports help you understand:

- New conversations and conversations by the time of day
- Where conversations are happening
- Who is responding to the most conversations
- How conversations are being tagged
- Team performance
- Routing rules

Looking at how many new conversations are started per day and where those conversations are happening, helps revenue teams better target buyers and customers on your website.

Additionally, sales and SDR managers can use the Team Performance report to evaluate their rep's interactions with website visitors. They can see the median response time across the site, how many visitors reps are having conversations with, and how visitors are rating those conversations.

Who's responding to the most new conversations? ⓘ
January 23 – 30, 2020 Export CSV

| Drift teammate | # of conversations |
|--|--------------------|
|  [Name] | 603 |
|  [Name] | 429 |
|  [Name] | 71 |
|  [Name] | 67 |
|  [Name] | 65 |
|  [Name] | 62 |
|  [Name] | 50 |
|  [Name] | 49 |
|  [Name] | 47 |

The Routing report is popular with marketing and sales ops managers. Here you can see where conversations are being routed. Lead routing rules are set from the Lead Routing tab. From there you can set custom routing rules for your sales team. Clicking into these rules reveals how many conversations were routed to each sales rep.

You can only improve what you can measure. We hope the insights in this chapter make your Drift integrations and setup more seamless.

Learn More About the Drift Solutions Mentioned in This Chapter

- [Drift Integrations](#)
- [Drift for Salesforce](#)
- [Drift Reporting for Conversational Marketing](#)
- [Drift/Salesforce Reporting](#)

CHAPTER 5

Final Thoughts & Additional Resources

Ready to become a revenue accelerator? We're here to help.

Our company culture at Drift is grounded by [eight leadership principles](#). The first principle on that list is to *put the customer at the center of everything we do*. That's why all our revenue teams came together to write this book just for you.

Still, if you need more guidance, we have several resources you can dig into:

1. [The Free Guide to Using Drift](#)

An online guide of basic Drift solutions and how to use them.

2. [Drift Terms & Product Glossary](#)

Become Drift-fluent with this downloadable guide to common Drift product terms.

3. [Drift Professional Services](#)

Don't go it alone. Find even more success with our dedicated team of Drift experts ready to help execute your go-to-market strategy.

4. [Learn From Drift Customers](#)

See how Drift partners with customers to accelerate revenue.