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*50 Years of Growth, Innovation and Leadership*

Webinars Can Improve Business Processes  
Leveraging ReadyTalk and Salesforce.com for Better  
Customer Development

A Frost & Sullivan  
Case Study

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Webinars already help companies generate leads and convert them into sales. But, when paired with a customer relationship management system, webinar data can be integrated into business processes to help companies generate even more leads and sales. While companies can gather a lot of information about webinar registrants and attendees based on the information they fill out before joining the event and their behavior during the event, what matters most is what companies do with that information after the webinar. For most sales organizations, this follow-up activity is outlined and performed in a very strict fashion and tracked within their CRM system.

OverDrive, a digital media distributor focused on the library, school, and retail markets, has seen its business accelerate since 2009 with the influx of eReaders, smartphones, and tablets into the market achieving mainstream status. The 25-year-old company was ahead of the curve when it partnered with leading publishers to manage their digital distribution channels. Now, OverDrive is a leading multi-channel digital distributor of eBooks, audiobooks, and other digital content, delivering secure management, digital-rights-management (DRM) protection, and download fulfillment services for publishers, libraries, schools, universities, government agencies, corporations, and retailers. The company serves millions of end users globally each year and is expanding into new markets—at home and abroad—and to do so, it needs to ramp up its sales and marketing engine.

“We solved a pressing need for publishers because they were facing massive force reductions, coupled with diminishing revenue, and they lacked the resources to design, deploy, and maintain a digital content distribution infrastructure,” said Jill Myers, Business Systems Analyst, Knowledge Services. “We manage all of these requirements for them, as well as provide scalability and PCI-compliant security, which is absolutely essential for our partners. Our development team created DRM encryption to protect our partners’ assets, which paved the way for us to create relationships in the institutional market and begin distributing digital content. Today, we’ve expanded our development efforts to include device- and platform-specific apps to support the exploding iOS, Android, and BlackBerry smartphone, eReader, and tablet markets.”

As the leader in the U.S. and other English-speaking library markets, OverDrive is looking to expand its customer base; the education space is an emerging vertical market for the company. The training team regularly works with the sales and account management teams to develop and present webinars to demonstrate the company’s products and services and educate the market, thereby driving new leads to the organization. This approach looked like the best way to open new markets, but there was one problem: “My users said their conferencing capabilities fell short from a participant-management perspective,” said Myers. “They would schedule meetings and email their target audience, but they had very limited insight into the Web session lifecycle—participants who register, attend, cancel, no-show, etc.” Worse, they had no mechanism for capturing that data in Salesforce.com, OverDrive’s CRM system, which it uses to manage all its interactions with prospects and customers.

The issue came to a head in the middle of 2010, when OverDrive began planning for its annual month-long virtual training event for customers. As Myers notes, many companies have annual user conferences during which they bring together all their clients in one place for a few days of training, updates on the vendor's vision, and networking. But, given OverDrive's primary customer base—libraries, which traditionally struggle with funding in the best of times, and which have taken an enormous budgetary hit since the recession—OverDrive delivers its annual training event virtually via Web conference. The system works extremely well, with scores of sessions available throughout September and October and registration nearing 15,000 attendees. The catch: sales reps couldn't reliably access and use the data those registrations provided, let alone monitor who attended which events. That made follow-up difficult, and up-selling and lead conversion much more cumbersome and time consuming.

### **Streamlining Webinars with ReadyTalk for Salesforce**

If you run marketing webinars or other large web events, you know how much time it takes to plan and promote the event. You also know how much effort goes into getting webinar registration and attendance data into salesforce.com. Save time and skip the tedious spreadsheet work with ReadyTalk for Salesforce:

- Send polished email invites to leads, contacts and campaign members, or use your own email marketing system.
- Collect registrations with a customized form and automatically capture the details in salesforce.com.
- Create new leads for registrants and attendees not already in salesforce.com.
- Instantly record attendance data and get visibility into key webinar metrics right in salesforce.com.

Myers had a challenge on her hands: She and her peers liked ReadyTalk, OverDrive's strategic Web conferencing provider, for its platform and features and its robust registration and attendee-data capturing capabilities. But, she knew she needed something that would better meet the CRM needs of the sales and account management teams. "The ReadyTalk delivery platform was ideal because there is no client app to download, which can be a serious distraction and source of frustration for users and facilitators. My clients needed more robust contact-management features and I was on the hunt to find a solution to minimize this pain point," said Myers. "However, because of ReadyTalk's benefits and the positive feedback we

receive from our partners, I needed a compelling reason to promote changing vendors.” Fortunately, just as her internal clients were clamoring for a solution, Myers learned that ReadyTalk was about to pilot a program to integrate its own registration and attendance data with Salesforce. “They asked us to participate, so we patiently waited and let them roll this out. And, I am really glad that we did,” she said.

The key, says Myers, was the management of the Web conferencing registration information. ReadyTalk’s registration information was great, but OverDrive’s sales and account management teams weren’t doing anything with it because the company lacked resources to massage, analyze, import, and maintain the data in Salesforce. “Now with ReadyTalk for Salesforce, we have the integration we desperately needed—the marriage of our contact, campaign, and Web session participant data is so powerful,” said Myers. Her sales reps and account managers can see all the different status levels—pending, accepted, canceled, declined—which means they can quickly identify contacts that have received and replied to email invitations, and those who have expressed interest in, or even attended, specific events. That allows for custom follow up, which is itself tracked in Salesforce, just as any other customer interactions would be.

Myers said that she and her team could conceivably have designed a custom application to mine the data from the ReadyTalk system and then import it into Salesforce. Aside from the time and money involved in such a project, getting the information to merge smoothly presented an enormous challenge because, in the case of webinar registration, end users are submitting their personal data, which drastically reduces the likelihood of a high-confidence match with Salesforce data. For instance, OverDrive may list a customer as “John R. Smith, Director of Collection Development, Hometown Library System,” but when he registers for an event, Mr. Smith may do so as “J. Smith, Collection Dev, Acme Main Branch.” Getting that data to match using custom-made algorithms is difficult.

With the pre-packaged integration, however, such data merging has gone remarkably well. “It can’t completely eliminate the risk of duplicate or disconnected contact data, but the app is doing some analysis on ingestion that needs only the email data point to match for it all to merge,” said Myers. “If you register on ReadyTalk with information that’s slightly different from what we have, it goes into a special queue informing my users that action is required. If a participant’s registration email matches existing data in Salesforce, the application automatically syncs the records.”

Myers recently analyzed registration data for the 2011 training conference being held in September, and she found a 95 percent matching-response rate. And, for registrants and attendees who were not found in Salesforce, the tool provides the flexibility to automatically or manually create new Salesforce leads.

With only 100 employees and 10 sales reps, OverDrive is also starting to use the ReadyTalk service for prospecting. “Our team really isn’t big when you consider the possible customer base and buzz surrounding our business right now,” said Myers. “We need a way to reach a large audience with just a few, focused resources.” She adds that today she is developing analytics capabilities to help prioritize and focus sales team activities leveraging ReadyTalk data to guide targeted messaging to existing customers as well as new prospects. The company already provides partners access to recorded Web sessions for ongoing training needs and is gearing up to produce weekly seminars that can be recorded and posted on OverDrive’s website to reach a global audience of publishers, partners, and end users.

Eventually, Myers said she’d like to see the expansion of OverDrive’s existing social media strategy to include ReadyTalk’s built-in tools for promoting webinars and recordings through social media sites like Facebook and Twitter. “Knowing that prospect, partner, and employee engagement data is integrated with Salesforce and I have visibility into that activity is extremely exciting because I know our business intelligence and customer service capabilities are going to dramatically increase,” she said.

Like many organizations that use ReadyTalk for customer-facing webinars, OverDrive also uses the service internally for meetings and strategic collaboration with partners. Myers, who works remotely from her home office, says she uses ReadyTalk sometimes four or five times a day, adding that it’s one of the reasons she’s able to successfully manage a team and interact with internal clients from home.

Best of all, ReadyTalk’s customer service has been excellent—something that’s critical for both OverDrive’s training and education sessions and for its internal meetings. “My experience has been exceptional,” said Myers. “We needed help with a configuration issue, so I decided to try their chat support... and immediately I received the information I needed.” It’s that kind of experience, she notes, that has her excited to use ReadyTalk and Salesforce to grow OverDrive’s business for years to come.



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