

COUCH & ASSOCIATES BOX A CASE STUDY



Box Streamlines Campaign Management & Ups The Ante
On In-House Resources

OVERVIEW

Case Study Summary	01
About Couch & Associates.....	01
Customer Overview	01
Business Challenge	02
Solution	03-05
Results	05-06

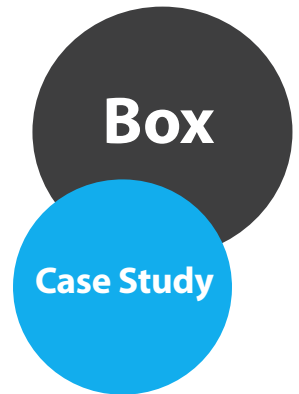
COUCH & ASSOCIATES

BOX STREAMLINES CAMPAIGN MANAGEMENT & UPS THE ANTE ON IN-HOUSE RESOURCES

SUMMARY BOX

Box provides a secure, scalable content sharing platform that both users and IT love. Over 8 million users and 100,000 companies use Box to manage information and collaboration in the cloud, with enterprise-grade security. With Box, content can be shared internally and externally, accessed through mobile devices and extended to partner applications.

In 2011, the company approached Couch & Associates to maximize the value of its marketing automation investment and implement practices and processes for long-term success.



ABOUT COUCH & ASSOCIATES

Couch & Associates Inc. is a professional services marketing organization that specializes in adding value to marketing processes through automation, effectiveness and sales enablement. Couch & Associates consultancy consists of lead consultants, account & project managers that drive initiatives to their 200+ clients ranging from SMB to Fortune 500. The Couch & Associates design and technical teams add value through their knowledge of best practices and experience with marketing technologies and surrounding infrastructures. The team is certified with a variety of software platforms including Eloqua, Salesforce, Netsuite, SLX and Microsoft Dynamics.

CUSTOMER OVERVIEW BOX

Box was founded on a simple, powerful idea: people should be able to access and share their content from anywhere. Since 2005, Box has helped more than 8 million individuals, small businesses and Fortune 500 companies do just that. Box has reinvented what businesses can do with content through its content sharing platform, made for a new kind of worker, a new kind of workplace and a new kind of IT.

BUSINESS CHALLENGE

Understanding the value of marketing automation, Box implemented Eloqua in November 2009. At the time, the company had just one team member in house managing the system, and less than a year later, Box realized they needed an additional resource to balance its goals for more strategic automation processes in addition to responding to day-to-day activities. Box also wanted to ensure that it was maximizing the value of its automation investment, particularly for its inbound inquiry needs.

Box needed a more efficient way to develop processes and practices for long-term success, in addition to a solution that would enable the company to:

- More efficiently qualify prospects and inbound inquiries
- Integrate more effectively with Salesforce, to tie activities back to the CRM system
- Leverage more efficient lead scoring and nurturing programs to streamline progress through the funnel



Maximize

**Marketing
Automation**

The company selected Couch & Associates based on a customer audit, through which the Box marketing team was given rich visibility into the details, gaps and missed opportunities within Eloqua and its CRM integration. The audit helped Box pinpoint areas within the CRM system that were not fully being maximized.

“The audit was hugely helpful in giving us confidence in the relationship. It set us on the right path, in terms of how we were going to work together and helped us define the breadth of projects we planned to accomplish.”

— Joyce Sohn, Product Marketing Manager, Box

COUCH & ASSOCIATES

BOX STREAMLINES CAMPAIGN MANAGEMENT & UPS THE ANTE ON IN-HOUSE RESOURCES

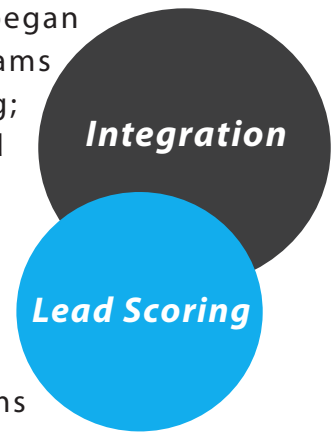
SOLUTION

To support Box's need to optimize the efficiency of day-to-day activities, including the usage of the Eloqua marketing automation system, Box began working with Couch & Associates. The Couch team implemented programs to help streamline key tasks, such as email sending; newsletter sending; the creation of emails within Eloqua; and the usage of templates based on Box messaging and content.

Couch & Associates also revisited Box's existing nurturing programs, essentially building new ones from the ground up to incorporate lead scoring to more effectively qualify prospects. Box needed to more tightly integrate Eloqua with its CRM system to better track all programs and campaign initiatives, in addition to providing the Box Sales team more information on each incoming lead. Through an enhanced lead scoring program, Box was able to set up scoring thresholds that helped the Box Sales team do their jobs more efficiently. This ultimately created a more positive experience for customers, as well, given the streamlined alignment of internal tasks.

Couch & Associates helped Box build a foundation for all internal programs, which helped the company understand what kinks needed to be worked out and considered to maximize efficiency. This enabled Box's internal teams to replicate success across different segments and tasks.

Box also worked with Couch & Associates on development of Box-branded surveys for its nurture program, as well as the development of a custom cloud connector that is used for 3rd - party integration into Eloqua.



SOLUTION

“It was really helpful to have the expertise of Couch & Associates. We were able to get a lot more insight out of Eloqua that isn’t generally available. The Couch Team was able to build out our activity aggregator to collect better information on our prospective leads over time.”

— Joyce Sohn, Product Marketing Manager, Box

*Eloqua
Training*

Insights

During the initial partnership, Box brought on a new marketing automation manager, Sophia Dao. Challenged with serving the automation needs across the entire company, Dao had a multitude of urgent responsibilities that needed immediate attention and some additional support.

“My first week at Box, I was thrown in to a bunch of things that were started but never finished. Basically when I flew to Toronto, I had a long list of things I had to do, that I didn’t know how to do, and in my training with Couch & Associates, we went through the fundamentals, making sure that I was doing things correctly. My trainer and I walked through the huge to-do list, and in that session I learned a lot, doing what I needed to do, learning the complete flexibility around those key steps in Eloqua.”

— Sophia Dao, Marketing Automation Manager, Box

COUCH & ASSOCIATES

BOX STREAMLINES CAMPAIGN MANAGEMENT & UPS THE ANTE ON IN-HOUSE RESOURCES

SOLUTION

In the months following the transition period, Box and Couch & Associates worked collaboratively to help Dao ramp up in-house efficiency. Due to a constraint of resources, Box enlisted Couch & Associates to act as a “pair of extra hands” to directly build up key programs and help with development of new emails and landing pages.

“The amount of information our marketing automation manager has learned and what she is capable of doing today is a reflection of the relationship that we had with Couch & Associates, and the quality of the time we spend together in regular meetings and working sessions. Her being able to work this autonomously is definitely correlated with how Couch & Associates has supported us this last year.”

— Joyce Sohn, Product Marketing Manager, Box

Effectively

*Track
Prospects*

RESULTS

Now empowered with scalable, easy-to-repeat processes for program and campaign management, Box is utilizing marketing automation across other key operational segments that can be more effectively executed.

Box’s marketing initiatives are now tightly integrated with its CRM system, so the company can more effectively track prospects through the use of campaign ID, and can see real results in from a revenue standpoint.

Working closely with Couch & Associates, the Box team was able to easily transition its team to develop a greater understanding of how to maximize its marketing automation investment. With enhanced visibility into market opportunities, and foundational processes in place for success, Box is now able to more efficiently manage its automation system and optimize its functionality across the organization.

RESULTS

“I think the beauty of the programs that Couch & Associates built out is that they’re built for scale and longevity. These programs are sustainable for the long term.”

— Joyce Sohn, Product Marketing Manager, Box

Empowered

Visibility

One of Box’s primary objectives was to be able to utilize Salesforce to track the results of closed opportunities from generic campaigns and nurturing programs. Not only is Box now empowered with the processes and education to do this effectively, but the team has also seen **real results translated into dollars due to this practice.**

Additionally, the Box team has ramped up in-house resources and will continue a long-term relationship with Couch & Associates.

“I think generally, the fear of working with any consultant, or third party vendor, is always the risk of becoming entirely co-dependent on them, to the point where, you’re unable to build on top of the work they’ve done without their direct support. I’ve been really happy with Couch, because they give our team visibility into all the details of their work so that we’re able to troubleshoot in house, and leverage these centralized program in an easy way. They’ve also set us up to be able to build on top of what they’ve laid down.”

— Joyce Sohn, Product Marketing Manager, Box