

## Marketri Supports a SaaS Provider in a Targeted Sector on their Path to Accelerate Growth

### THE CHALLENGE

When you're selling an innovative SaaS solution with a long sales cycle in a competitive market against bigger competitors like Salesforce, you can't just build brand awareness and hope the orders rush in. That was the reality for Epoch Solutions Group, which provides a map-centric technology platform that transforms how utilities manage their field workforce.

Epoch recognized it needed a strategy-based marketing plan that reflected the unique challenges of its selling environment while helping it scale faster. Since the company used a Fractional CFO model successfully, Epoch CEO James Street sought a fractional marketing services agency and the strategic guidance of a Fractional CMO. After meeting with Marketri, he knew he'd found the right partner to support the company's path to aggressive growth.

### THE APPROACH

#### Setting the Foundation

During the discovery phase led by Marketri Fractional CMO Jen Marino, it became clear that while the utility industry is going through a major digital transformation, getting from the concept of field workforce automation to a decision took one to three years and involved many influencers across the organization.

To keep buyers engaged throughout this long, complex cycle, Marketri devised a content-led marketing strategy that both positioned Epoch as a thought leader and nurtured buyers while they were busy clarifying their needs, solidifying their internal operations, and laying the groundwork with procurement.

With a strategy in place, Marketri developed a comprehensive, omnichannel marketing plan, created new positioning and messaging to differentiate Epoch, devised a marketing funnel to drive and nurture leads, and revamped the website to support lead generation.



#### AT A GLANCE

##### Industry

SaaS

##### About

Epoch Solutions Group transforms field service operations for utilities with mobile, map-first technology solutions that power business processes, online or off.

##### Partners Since

August 2021

##### Notable Results

- Drove nearly 1,400 leads at a cost/lead well below the target
- Generated 100+ Marketing Qualified Leads (MQLs), a healthy number for this business in a targeted industry, at a cost of less than \$300/MQL
- Dramatically increased email click-through rates, from <1% to 11%
- Increased unique visitors to their website by more than 70%

# Getting the Technology in Order

An effective lead-generation effort requires the technology infrastructure to track, score, and act on leads. As a HubSpot Gold Partner, Marketri knew exactly how to optimize Epoch's HubSpot architecture to do just that.

The team developed and implemented a lead scoring strategy, then created workflows that automate marketing campaigns. Now, each lead automatically receives the most relevant content to move it further along the revenue funnel, leads are handed off smoothly from Marketing to Sales, and the Sales team knows where to prioritize its efforts. Both Jennifer and the Epoch head of Sales use HubSpot daily to see how buyers are engaging with the company and decide how to adjust campaigns accordingly.

## Executing the Plan Flawlessly

With the foundation in place, Marketri got to work implementing and optimizing the marketing plan. Job one was to create robust content in a mix of formats, both gated and ungated, to keep Epoch top of mind with decision makers and influencers until they're ready to evaluate solutions.

Since buyers of this technology intrinsically understand the need—and don't want a demo until they're closer to launching the RFP process—Marketri realized a demo request couldn't be the only call to action. Instead, buyers can get an assessment of their current solution or process, creating another touchpoint for converting a lead to a Sales conversation. Similarly, webinars provide an additional way to gain insights about field workforce management without a demo.

Epoch's omnichannel marketing program also included:

Short product videos that illustrate the technology solving specific challenges utilities have today

A paid search program guided by insights from Google Max, targeting specific job titles and optimizing the creative based on ad performance

Partnerships with utility influencers to expose new buyers to the company's capabilities

A comprehensive trade show strategy that engages with potential buyers and current customers before, during and after the event

# Leveraging the Fractional Model

Epoch has taken full advantage of the Marketri fractional marketing model, gaining access to highly experienced marketers who function as an extension of the company.

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It's been a seamless integration, where we feel like the Marketri team is another department in our organization, it's not at all like a vendor-customer relationship. We're working toward a common goal, side by side.

**JAMES STREET**  
EPOCH CEO

“

We needed strategic marketing direction but couldn't justify an FTE at this stage in our lifecycle. Jennifer drives the marketing strategy, oversees the implementation, and optimizes the marketing spend and results.

**NATALIE STREET**  
VP OF OPERATIONS

She also leads the inside sales function for the company, helping to generate new leads via sales reps through a cold outreach program utilizing phone and digital communications. And as a member of Epoch's executive team, she participates in leadership team meetings, presents to the board quarterly, and is held just as accountable as any other senior leader.



# Driving Leads and Engagement

The Marketri-led marketing program is doing exactly what it was designed to do: Drive ideal buyers to engage and consider Epoch as their field workforce management solution provider. Even in a niche market with a limited number of targets, the program achieved these outstanding results in 2022:



**Drove nearly 1,400 leads at a cost/lead well below the target**



**Generated 100+ Marketing Qualified Leads (MQLs), a healthy number for this business focused on a targeted sector, at a cost of less than \$300/MQL**



**Dramatically increased email click-through rates, from <1% to 11%**



**Increased unique visitors to their website by more than 70%**

"We've seen leads interacting with our website, looking at our content, and sharing it with others in their organization while they're in the RFP stage," James said—all of which can give Epoch a leg up, especially in a business built on high-value, low-volume sales. By year-end 2022, Epoch saw its revenue more than double, and it's now on track to log record sales in 2023.

Marketri is also supporting Epoch along its culture transformation journey, ensuring it can compete for and retain top talent and keep staff engaged and committed to its success. "Our marketing shows everyone that we're growing—we're no longer a company that revolves around a small nucleus of few people," Natalie said. "Marketri has helped us present a polished image to candidates, solidified our core values, and partner with HR to develop an employee engagement program that's just getting underway."

The marketing effort has even helped Epoch attract the investment community's attention. When the company took on an investor in early 2022, the PE group commented on the image that Epoch's marketing portrayed: one of a highly professional, vibrant company.

"The PE group is happy because other peers are asking about us and commenting on our activity in the market. So, even in this space people are noticing us," James said.

Schedule a free consultation to learn how Marketri can transform your marketing department from a cost center to a profit center.

[Schedule a Call](#)

