



CASE STUDY

# KASEYA



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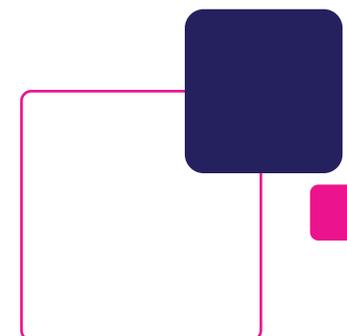
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# ABOUT

## Kaseya

Kaseya provides best-in-breed technologies that efficiently manage, secure and back-up IT under a single platform so that multi-function IT professionals get the most out of their IT tool stack.

- **Industry:** Computer Programming Services
- **Headquarters:** Miami, New York and Dublin
- **Customers:** Over 40,000 SMB's and managed service provider organizations
- **Company size:** 800

Kaseya has been expanding rapidly using a merger and acquisition strategy and has recently introduced a new go-to market strategy.

Juliet Forte, the VP of Marketing Operations shares with us her insights as to how they have been able to meet both these strategies head on using data. She talks us through their merger and acquisition, lead routing and duplicate data challenges and how they overcame them using data orchestration with RingLead.

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## SECTION 1

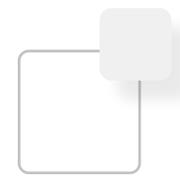
# ACCELERATE AND ENABLE MERGERS AND ACQUISITIONS

### At a glance:

**Challenge:** Thousands of duplicates immobilize sales & marketing from upselling to expanded customer base

**Challenge:** Duplicates Threaten Maintaining GDPR & CCPA Compliance

**Solution** – Batch Deduplication & Duplicate Prevention



## CHALLENGE



**Thousands of  
duplicates immobilize  
sales & marketing  
from upselling to  
expanded customer  
base**

As part of their go to market strategy, Kaseya was in the process of expansion and purchasing of different companies. As a result of these company acquisitions, Kaseya's database started to grow exponentially and became overwhelming to manage with an excess number of duplicates.

Due to the massive number of duplicates, there was no single source of truth. One of the key benefits of a merger or acquisition – the ability to cross-sell across companies – was simply not there.



*Before RingLead we had 50,000 duplicates on the account record alone - from a lead's perspective we had over 10,000 unintentional duplicates*



*Nobody knew who the Account Manager was of a customer account that we might share with the company that we just acquired - It was extremely difficult for us to expand relationships with so many duplicates in the system*

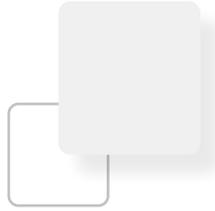
CHALLENGE



**Ensure ongoing compliance**

With so many duplicates in their database, Kaseya needed to ensure that if someone asked to be forgotten, they would be able to honour that request across all records to maintain compliance requirements. This became an increasingly challenging and complex process to manage when there could be as many as five duplicate records in the database.

## SOLUTION



# Automated Batch & Real Time Deduplication

Juliet implemented a process of deduplication to ensure a single source of truth. They then identified the account manager and were able to establish responsibility and accountability for maintaining and growing the relationship. To remove the clutter resulting from handling multiple migrations during several acquisitions they adopted the following process:

- 1** Import the data from the source system into the target Salesforce instance
- 2** Use RingLead immediately after to deal with the duplicate merging
- 3** Ensure that all records are owned and sent to the correct account manager.

Using RingLead the entire database was deduplicated over the course of a weekend - starting with accounts to account then leads to leads. Leads were then converted into contacts and attached to the appropriate account, then contacts to contacts within a single account were deduplicated. While being able to perform mass data deduplication, Kaseya were able to preserve key relevant data and deduplicate ongoing.



*With RingLead, we manage intricacies and get right down to the field level deciding which value wins over others. We dictate who is the owner of the surviving account and make sure we don't lose any related data, opportunities, subscriptions, and opt-outs as a result*



RingLead's deduplication removed 50,000 unnecessary and unintended duplicates resulting in:

- Increased conversion by reps focussing qualified leads, rather than manually identifying if they are suitable
- Saved money through improving resource allocation
- Reducing data storage costs

Kaseya now has a system in place to successfully integrate several sources of incoming data, and deduplicate their own database while retaining relevant and proprietary data in the correct format. The ease of using one single platform and that is structured for all their migration processes, enables all future mergers and acquisitions to go smoothly. With a program in place to manage the merging of company databases, Kaseya achieves a smoother transition. They have better insights into their accounts, and ability to cross-sell, increasing conversions and revenue. Their compliance is also much easier to manage.



*Now that we have RingLead, it is much easier to make sure that we're honouring compliance requirements - we're very confident that when we find that one particular record, it's the only one that exists.*



*Companies that are doing acquisitions absolutely need to have a solution in place for dealing with the duplicates or else they will be losing revenue - it's nearly impossible to do without a platform like RingLead*

## SECTION 2

# ENABLING GO TO MARKET STRATEGY – LAND & EXPAND

Kaseya needed new processes to properly execute their 'Land & Expand' go to market strategy. This strategy was based around the desire to grow their customer base and enhance their existing customer relationships and manage their mergers and acquisitions. Their goal - to bring in new customers as quickly as possible with minimal friction and then expand on their relationship to drive further revenue.

### At a glance:

**Challenge** - Complex Routing Workflows Needed to Enable GTM

**Challenge** - Leads Not Followed Up on Due To Inaccurate Routing.

**Solution** – Intelligent Routing & Duplicate Prevention.

**Challenge** – Slow lead reassignment resulting in loss of productivity and revenue.

**Challenge** – Lack of lead-to-account matching using native Salesforce.

**Solution:** Establish intelligent workflows with RingLead.

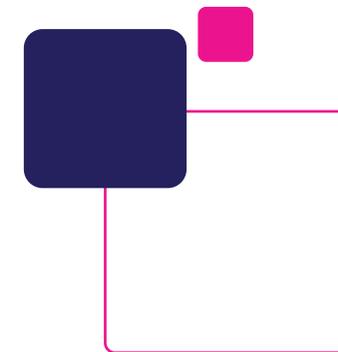
## CHALLENGE



# Optimize lead assignment to enhance a go to market strategy

Kaseya wanted to allow multiple different appropriate sales reps to work on a single record at the same time. Potentially there were multiple sales cycles occurring within a single company at the one time.

Their current platform strapped them into a single lead per person and a single account per company. Restricted by their software and without use of an intelligent routing system, they were unable to optimize their lead assignment which really limited their ability to implement their go to market strategy.



## CHALLENGE



# Increase lead conversion by reducing follow-up time

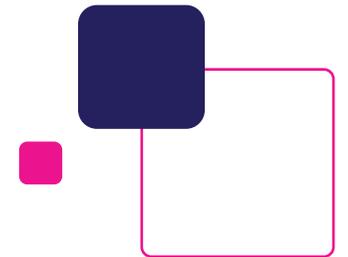


Kaseya used Cloudingo in conjunction with Salesforce to deduplicate and distribute leads, but this was not effective. Leads weren't being followed up, or were erroneously assigned to the wrong rep meaning:

- Inefficient and inaccurate routing leading to a potential 5% loss of leads.
- Wasted time for reps organising lead reassignment
- Mass lead abandonment

Poor conversion rates.

Large numbers of records were abandoned and just never followed up on because of them initially getting assigned to the wrong person



## SOLUTION

# Harness necessary duplication at the lead stage

Kaseya switched to RingLead to achieve the flexibility of lead assignment across several sales teams. They changed their duplication management to capitalize on their go to market strategy by using purposeful duplicates at the lead stage in appropriate instances – leads associated with different sales teams or business units at the account stage. This meant that multiple sales teams could work independently on the simultaneous sales cycles that were occurring within a single company.



*There used to be a lot of pushback from our reps in terms of the number of records that were getting incorrectly assigned. Since implementing RingLead they now have confidence in the process leading to a stronger relationship between Marketing and Sales. We are now a much stronger go-to-market team as a result*

## RESULT

Using RingLead and necessary duplicates Kaseya have optimized their lead assignment and consolidated all required functions into a single effective, efficient tool. They now retain a single account assigned to the appropriate account manager to undertake the expansion component of the strategy and reap the benefits of:

- Quality lead assignment processes that improve lead follow up time
- Faster lead assignment - the clock starts ticking earlier  
Achievement of SLAs
- Lead follow-up on within an hour from the Rep receiving them
- Ability to contact the right leads earlier
- Higher lead conversion increasing revenue

## CHALLENGE



# Slow lead reassignment resulting in loss of productivity and revenue

Their overflowing database resulted in a loss of revenue in the form of resource allocation, having sales teams manually manage their duplicates to avoid the loss of key relevant data. With more acquisitions on the horizon, Kaseya needed a way to handle the migration of information into salesforce while preserving relevant data.

Kaseya needed to get data into Salesforce and in the hands of multiple reps quickly to avoid missing opportunities and prevent leads going cold and were using Cloudingo to assist. The required account matching and lead assignment was a very slow and inaccurate process. With frequent incorrect assignments, they found that leads were sitting for up to an hour before reassignment to the correct rep. Having more than 10 leads per day not getting followed due to routing to the wrong person, greatly affected conversion rates. Many records were simply being abandoned.

There was conflict among the new customer acquisition team and account management team.



*Before RingLead Kaseya we were wasting money, and likely losing money as well. We spent money on marketing campaigns, where we were generating leads that we weren't following up on because of poor lead assignment and handling.*

It was clear Kaseya needed to find a different approach.

## CHALLENGE



# Lack of lead-to-account matching using native Salesforce

Kaseya wasn't able to perform the lead-to-account matching so integral to their go to market strategy using native Salesforce features. They developed their own code that wasn't very easy to manipulate. Few people within the organization understood how it worked and making updates or changes was complex and time consuming.

They were also missing the flexibility of being able to introduce several account-based routing scenarios after the match to get the lead into the hands of the right reps quickly.

## SOLUTION

# Establish intelligent workflows using triggers

A robust system that can appropriately match leads to accounts is integral for routing new and existing customers to the relevant salesperson. Kaseya took advantage of RingLead's all in one orchestration tool and implemented multiple lead to account matching and lead matching processes.

Kaseya set up triggers through RingLead to allow for point-based lead to account matching essential for accurate and fast routing. They used RingLead to establish triggers within their Salesforce instance, to look for newly created or engaged records not owned by a sales rep. They then implemented the following automated workflows:

- 1 Identify the record doesn't match either an account or an existing related lead
- 2 Trigger the lead-to-account matching process
- 3 Confirm no lead-to-account match
- 4 Trigger lead-to-lead process
- 5 Confirm no related leads or records
- 6 Distribute the lead to the appropriate team using Round Robin

Once established, these triggers automatically ensure that records are assigned to the right sales rep. Kaseya have also set up triggers for every existing record where there's a score increase.



*With RingLead, the lead to account matching is very robust, giving us any option we can think of under the sun in terms of matching the lead to the appropriate account and not only at the matching level, but then what happens after the match has taken place*



Kaseya saved immense amounts of time and money through RingLead's data orchestration platform by enabling intelligent routing.

RingLead provides a flexible lead-to-account matching system, and appropriate triggers to handle the steps after a match has taken place. RingLead's in depth system has also allowed Kaseya to match accounts based on customisable value fields, which has been priceless in terms of closing deals faster and at a higher conversion rate.

Lead to account matching is vital for our routing to support our land and expand strategy. We can now associate a new lead with the existing customer accounts, associate that record to the appropriate account manager and make sure that they can grow and expand that customer relationship.



*For us, and potentially any organization, we can retain up to 5% more leads by using intelligent routing for more speed and accuracy*



*With RingLead we know the lead is getting assigned to somebody who can and should be able to work that record – the first time. We have reduced our follow-up time by as much as half.*

## OVERALL RESULTS FOR KASEYA



Kaseya is a big believer in an all-in-one platform. This is their own competitive advantage in their market. For them having an all-in-one data orchestration platform is vital and has allowed them to:

- ✓ Accelerate and enable their mergers and acquisitions
- ✓ Improve revenue through cross-sell and expanded customer base
- ✓ Ensure their ongoing compliance
- ✓ Enable their Land & Expand go to market strategy
- ✓ Increase lead conversion by reducing follow-up time by half.



*RingLead guided us through our complex rules - helping us to define them in ways that we could implement them - we had a finite set of attainable business requirements that we could implement within the tool.*



*I recommend RingLead to any marketing operations or sales operations team with many duplicates they can't get a handle on within their system. If you are struggling with lead routing and implementing a robust lead routing platform to help you achieve your goals, RingLead can help.*



The RingLead Platform orchestrates Salesforce and Marketing Automation processes like managing duplicates, data normalization, segmentation, enrichment, routing, and much more – fueling successful go-to market initiatives for modern RevOps teams.

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