

# Conversica Solution

## CASE STUDY



### Revenue Digital Assistants:

Sienna Mitchell, Sofia Garcia, Adriana Sousa

### Skills:

- ✓ Generate Interest
- ✓ Cultivate Leads
- ✓ Event Promotions
- ✓ Reactivate Interest
- ✓ Upsell Customers
- ✓ Cross-Sell Customers

### Languages:

English, Spanish, Portuguese

### Relevant Integrations:



## Business Results

**17.2X**  
ROI

**18.5%**  
CONVERSATION QUALIFIED RATE

**<3 Weeks**  
AAR PAYBACK

**12.6 DAYS**  
AVE. TO CONVERSATION QUALIFIED LEAD

## The Challenge

- Large pool of *dormant leads* unworked by Sales
- Lead handoff *too early* leaving a gap in the funnel

Iron Mountain, a global leader in information management services, grappled with a common challenge in its Marketing and Sales processes. With a large Target Account Market and a healthy flow of interest, the Marketing team was ending up with a large pool of unworked leads, particularly at the enterprise level.

“Whether it was because the account changed hands, or a Sales person forgot about it, or someone left the business, they weren’t getting the attention they needed to move forward. Partly I think our Marketing team was sending leads to Sales too early. In our business, the sales cycle can be six to eight months or even more. So Sales was saying, ‘Just ping me when the lead is within 90 days.’ ”

**JOHN HANSEN**  
Senior Director of  
Field Marketing  
Iron Mountain



In addition, the pandemic had increased the number of touches needed to convert a lead, and the Sales team just didn't have capacity to go back and sift through all the dormant lead stock to find the gems. Hansen and his Marketing team needed a scalable way to re-connect with the aged leads and handle the new early stage inquiries coming into the business to avoid leads aging in the first place.

"We wanted to find a solution that could re-engage and reactivate those leads, as well as keep new pre-MQLs engaged and bring them lower in the funnel. And that's how we landed on Conversica."

## The Solution



**Sienna Mitchell, Revenue Digital Assistant™**

**Skills: *Reactivating* Interest, *Post Event* Engagement, and *Cultivating* Leads**

In response to their challenge, Iron Mountain brought on a Revenue Digital Assistant™ to address the specific needs in their sales and marketing funnel. The initial adoption in late 2021 focused on utilizing Conversica's skills for reactivating interest, post-event engagement, and cultivating leads.

## Results

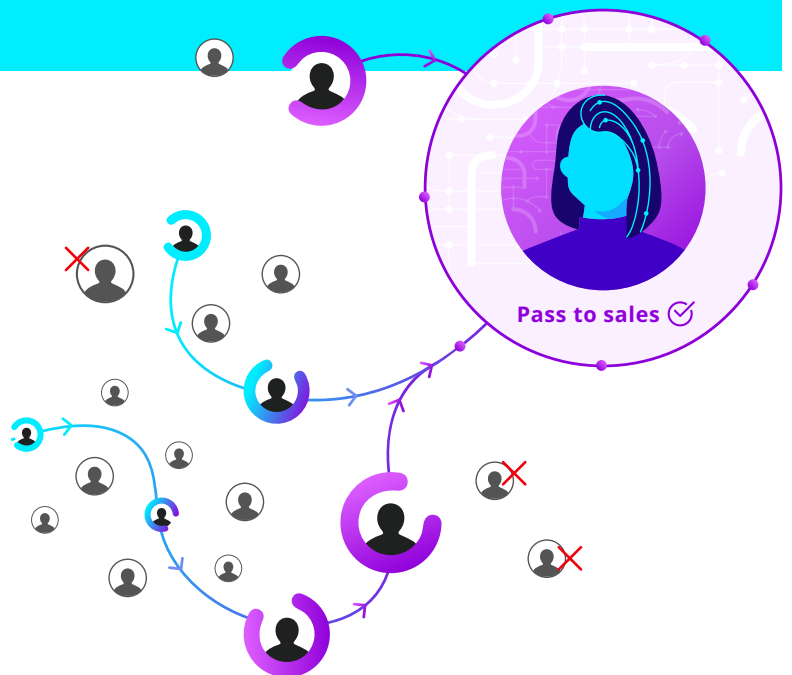
This powerful combination worked together to:

- ✓ **Reignited Demand** in their Aged Lead Stock
- ✓ Moved New Interest **Down the Funnel**
- ✓ **Surfaced Handraisers** at Every Point
- ✓ **Unlocking Revenue**

We used those three skill sets at first to tackle our main ‘problem children’ in our leads: unworked leads to early stage and then post-event,” Hansen said. “We connected with our Inside Sales team early on to say, ‘Hey, you’ve got this huge volume of accounts you need to do outreach for. Let us do that as part of this automated, scaled solution.’ Then, all they need to do is respond to the people who are responding to us via Conversica. They really like that. We’re bringing up those leads that are showing interest as a priority, and Conversica can continue to chip away at those that are hard to reach.”

As the team grew comfortable with their initial implementation, Iron Mountain saw opportunities to evolve its Conversica usage even further.

The next step for leads that turned ‘hot’ or Conversation Qualified was obvious—hand off to Sales. But Hansen’s team wanted to make a better plan for leads that reached the end of the Conversica conversation without indicating they were ready to purchase.



“We wanted to find a way to make it more of an always-on approach, a more automated way to feed leads into the program,” Hansen said. To that end, Iron Mountain integrated Conversica with Salesforce CRM and their Marketing Automation Platform, Eloqua, enabling them to create a smoother buyer journey from first touch to close and beyond.

“We decided we wanted to think about Conversica as an active nurture,” Hansen said. “Meaning the lead has engaged with us at some point, and now we’re continuing that conversation and moving them down the funnel. But we need a different strategy for our passive nurture, and that’s through our Eloqua platform today.”

When a lead is in their active interest stage, such as immediately after attending an event or downloading Iron Mountain’s content from a third party, they fall into a Conversica conversation for active nurture. The leads that engage with the Revenue Digital Assistant and indicate Sales-readiness through the conversation get passed to Sales. But those that don’t progress get passed automatically to an Eloqua nurture.

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“Our messaging in the active Conversica nurture is all about the here and now,” Hansen said, “whereas in the passive nurture, we focus more on keeping in touch and staying top of mind.”

And if a lead shows signs of life again by engaging with the passive Eloqua nurture, they can be returned to a new Conversica conversation designed to capitalize on the renewed interest.

This always-on approach paid off in a big way recently. A prospect had engaged with Sales in the spring of 2023, but had gone dormant and fell into one of Iron Mountain’s re-engagement campaigns toward the end of summer.

“The customer actually responded on Friday of Labor Day weekend, when everybody was out of the office,” Hansen said. “But the Revenue Digital Assistant was there.”

Iron Mountain’s assistant carried on the conversation with the customer while the team was out of the office, answering questions and eventually flagging the lead as ‘hot’ and ready for a rep.

“The rep got back into the office on Tuesday, picked up the phone, and responded to the customer live. By Friday, we had a \$500,000 deal.”

As of 2024, Iron Mountain has seen such great success with their Marketing use cases that they’re expanding even further, adding Revenue Digital Assistants for Sales and Customer Success to handle conversations across the entire lifecycle.

***“We’re reconfiguring our approach to the buyer’s journey with Conversica.”***

“We’re being asked to do more, to accelerate existing pipeline and opportunities, which we hadn’t really focused on before, so that’s a new use case we’re excited about. And once we acquire a customer, we tend to keep them for a very long time. So we’re thinking about how to onboard, delight, train, get them interested in a new product and eventually upsell and cross-sell. We’re just now starting those conversations, but it will give this consistent thread all through the lifecycle of the customer.”

1.

### Always-on is the *best value*

"I would really encourage people to figure out how to have conversations constantly set up. If you have to have someone administering on the back end, feeding leads in manually or deciding where they should go next, you're not taking full advantage of the capabilities."

2.

### Have a plan for *the next step*

"Not every lead is going to be ready to go to Sales after a Conversica conversation. If they get to the end of the active cycle, where to do they go? Do you send them to nurture? Do you do something else with them? That's definitely an area I would hone in on because there are some hidden gems in there."

3.

### Take a *wraparound approach*

"We found a lot of success doing Sales clean-up, for lack of a better term. If there was an account that hasn't been touched, a lead that was non-compliant, an opportunity in Salesforce that's been sitting for 60 days, we come in and grab that to do a Conversica re-engagement to check in and see if it's still live. That way, Sales can either reactivate it or put it to bed."



Conversica's Revenue Digital Assistants™ (RDAs) supercharge workforces to acquire untapped revenue through perfectly structured conversations across chat, email, and SMS. With billions of human interactions spanning more than a decade, Conversica's RDAs have learned to influence and persuade customers and prospects throughout the customer journey lifecycle. Unlike first-gen chatbots, Conversica RDAs are Powerfully Human™ and can hold meaningful conversations at every touchpoint to create brand loyalty and maximize every revenue opportunity.

To learn more, visit [conversica.com](https://www.conversica.com) and follow the company on [Twitter](#), [LinkedIn](#) and [Facebook](#).