

David Abrams: [00:00](#) Hello. Hello and welcome to episode number 12 the SaaS breakthrough show brought to you by Demio. The SaaS Breakthrough show is an inside look at what is working in the world of marketing SaaS companies today by the marketers who are in the trenches experimenting on a daily basis to grow their MRR and build amazing businesses. My name is David Abrams, I'll be your host today as we bring on Kasey Bayne a part of the marketing team at Olark live chat. Now Kasey is passionate about marketing tech in helping small businesses. And again she's part of the Olark team, the marketing team there, the most beautiful and effective way to talk to your customers for sales and support. With over a decade of marketing experience Kasey spent time building marketing and sales channels at FreshBooks, Kashoo and other companies across Canada and the U.S. focusing on building the best possible customer experience.

David Abrams: [01:01](#) When not in the office, Kasey can be found training for her next half marathon in gorgeous Vancouver, outside with a good book or off to the airport for her next travel adventure. Now on today's episode Kasey and I will be breaking down the exact steps that they took to grow from 10000 customers when she joined just about two years ago to an explosive company today. Now Olark if you haven't heard about them, you'll love them. They are a simple live chat software like I said they've been around for about eight years before Kasey even joined the team. So we talked about the experiences that she got by joining a team that had already had eight years under, what was it like to join a community with 10000 customers already and how when she joined they had to quickly look at how to revamp their marketing focus to work in a quickly evolving and competitive marketplace.

David Abrams: [01:51](#) Now the live chat space if you don't know has a ton of competitors, it's a very very busy space. They had some early opportunity there. But when the marketplace shifted they had to shift too and it was a big incredible journey to learn about. We also talked about how there was a big shift in the team's mindset to quickly get into fast moving experiments and testing which turned out to be a huge win and we even talked about the exact things that worked. Which channels worked great for them and what experiments really won this year. This was an incredible episode. Kasey is super open and transparent on everything over Olark. You're going to absolutely love this. Don't forget to give us a rating, leave us comments and questions. We love to hear from you guys. Join us in the SaaS Breakthrough community which you can find on Facebook. It's a free group, we'd love to have you guys in. You'll also find all the resources from this episode on our blog that's Demio.com and we look forward to hearing from you soon. Let's go ahead and get started.

Narrator: [02:57](#) This is the SaaS Breakthrough podcast. Uncovering what's working today in SaaS marketing by the actual SaaS marketers who are building companies day in and day out. Let's get started.

- David Abrams: [03:13](#) Hey Kasey thanks so much for joining me today. I'm so excited to have you here. Big fan of your company really big fan of what you guys are doing so thanks so much for joining me today.
- Kasey Bayne: [03:22](#) Thank you for having me. Really happy to be here. And excited to talk marketing with you.
- David Abrams: [03:27](#) Yeah. It's a conversation I love to have love to hear what you guys are doing. Maybe you will even start off talking a bit about Olark what you guys are doing. And then we'll jump into kind of your position there.
- Kasey Bayne: [03:43](#) Perfect. So I work at Olark Live chat so we are a really easy way to chat with your customers. They come to your website for sales or support... really great way to have those conversations with your customers your potential customers and really just start the conversation and grow your business.
- David Abrams: [03:59](#) I love it. And we are big fans of conversations, transparency and relationship building with prospects and customers. We do a lot of that with webinars obviously. So when did you join the Olark team? What did the company look like at that time? Maybe customer size.
- Kasey Bayne: [04:17](#) Yes I joined just about two years ago now and at that point yeah Olark had just pass 10000 paid customers which is yeah pretty exciting especially for a SaaS company in a pretty competitive marketplace. So they had just finished a really cool 10000 customer campaign which is part of what really got my interest in starting the conversation and get things going. It's been cool to see what we've been able to do in that time.
- David Abrams: [04:56](#) It's amazing. Time flying fast means things have been going well and you probably having a ton of fun.
- Kasey Bayne: [04:59](#) Oh yeah sure.
- Kasey Bayne: [05:01](#) You guys have such a cool company culture and vibe. What was your initial impression when you were coming in looking at the product? You know you're in a competitive space you really are there's a lot of chat applications out there obvious you guys are doing great. But what did you feel like when you're coming in and what was the team looking like?
- Kasey Bayne: [05:16](#) Yes it was quite small when I joined, probably just a couple of people. So it a really nice opportunity to you know influence on where we are going, not only as a marketing team but how we can position ourselves in the market against these other companies that have tons of VC funding and all that. But really like culture and that was really important to our team at the time. They were really fun and personal and really caring about their customers. And that is what is so important to me. I mean there's a lot of stuff you can do in marketing and sales but what really comes up to for me it's just you know

how can we make our customers lives better and we you know enhance the experience for them and just make really positive on both sides and helping both our companies.

David Abrams: [06:18](#) Totally that customer experience is critical and it sounds like a very product focused team product centric team as well. So it sounds amazing you're coming into this. You also said some of those are interesting you said there's only a couple of people on the team and some of their actions were like how do we still figure out our differentiating value. So would you say that that first 10000 was a kind of how those customers found. Was it still kind of working through the competition and you guys had a really good word of mouth. What got you to 10000 because obviously that had to just shift a little bit to get to the next level.

Kasey Bayne: [06:53](#) So we were one the first chat products in the market. We are around for almost 10 years which stands forever in internet years so we had an early mover advantage. We were one of the first really easy to use user friendly nature and non-technical user on the market. Really great word of mouth, tons conferences, lots of great PR. We really focused PR around the team but as the market, and as you know marketing tech in general just become more complex I mean you really like the main challenge I had when I come on was like how do we take all our customers who really love us this great word of mouth we had and turn it into something that is more scalable and feeble and something that we can really use help our company grow and get to that next level to support the expansion and the things we wanted to do. So how did you do that? Yeah really like my main focus when I came in, my first project was really about marketing automation and just centralizing all of our communications in one place.

Kasey Bayne: [08:38](#) So previous to that like we were using a bunch of different platforms. We had (..) Mailchimp (...) some hard coded into the app (...) I'm sure you know the feeling. So really really really everything into a central system and just kind of understanding like our customer journey and where, what kind of telecommunications are they getting from us and also for those new leads coming to our website where are they dropping. It's hard to know you know a lot of times when you joined the company, it's hard to know where to focus your efforts and when to make changes. So a lot of conversations with the team about what they wanted to do in marketing and you know with our CEO about where he sees us going but also just understanding at a data level where we're losing people or where parts of customer journeys where people are dropping off when we don't expect them to or maybe pages that are having high conversions that we don't even realize. So replicating that success into different areas and also lead generation.

David Abrams: [09:45](#) That's such a true statement about the data. Like I go crazy trying to figure out like where do I how do I get all my data like aggregate in one simple thing. Drives me crazy I can't imagine coming into it you know 10 like where we came in what eight years in?

- Kasey Bayne: [09:45](#) Yeah I'm just here 2 years so just a couple of years to know.
- David Abrams: [10:08](#) So you're trying to go through like eight years of data and try to figure out what pages or what has got to be super hard so I can totally understand that pain. What from a tactical level like what actual pieces of data were the critical ones? I think there's a lot of times just so much data to look at like what. What can you look at as like a quick glare of just saying OK here's some KPIs that we want to know. Here's what we had to look forward to understand that because the customer journey can be long. It could be it could be the Web site or it could be actual in the app or are you looking for?
- Kasey Bayne: [10:42](#) Yes so you really hit one key area of focus because it's really hard. Like you said they are everything from like the first time they see a Google ad, all the way through to when they put their credit card in. So really focusing on a few major areas. We found we were having, like our traffic to our website was pretty strong. But of course all those people don't sign up for our product and really figuring out ok like when somebody lands on our site we want to get them to sign to a trial and then from trial to conversion. So those are the two main parts that my team was focusing on. So figuring out on first half, ok so somebody comes to our website, so do they not have enough information, are we not presenting the use cases, are we not addressing the problems they have? And that was one of the things that we actually, we did our all website last year, really focused. Yeah certainly a work in progress but I am so proud of what the team put together and really instead of just focusing i which I think it happens in software and SaaS all the time but really presenting like right at the top, not just use cases but what problems are we solving for our customers. Like are you using chat to get more leads? are you using chat for customer support? And then once you click on those really presenting relevant data and relevant cases and statistics and integrations and really understanding the path that user is taking rather than just trying to be everything which is the easy way out. Once your market becomes more competitive and once you get over those early adopters you really need to address why, this person is not just here because we are the shiny thing or they read about us on crunch for this segment of the market they did not, like they don't have it in a tab open in their browser, they want to solve a business problem and how are we going to help them do that and then really just focus on that group. So if they are using chat to get more sales how are we going to guide them through the conversion process. How are we going to make their sign up easier. What integrations are we going to recommend? Maybe they want help plugin with their salesforce or their Hubspot or that kind of thing. To really paint the full picture for them and make it easier as possible to see how they can be successful with our product but also how our solution fits in with what they're already doing.
- David Abrams: [13:36](#) That is brilliant, brilliant answer there that's going narrow on the user case on how you're solving that problem being benefit driven given case studies are examples of other companies doing that in the specific ways to do it because where you want to be an integrated product to you want to really sanction of

like being added into their marketing process. So you just said that so perfect that's really amazing. So once you got through that and you guys are looking at that that data in the store owners say okay these are objectives we want to do first top of funnel to trial that we want to do the trial conversion rate. What did you guys are doubling down on. Where were you looking and seeing. These were the wins we asked you to read the website which can really help the flow. But what about traffic sources or the market acquisition are you guys doing?

Kasey Bayne: [14:23](#)

Yes that was certainly a challenge for us because we have done a lot of that just organically in the past. But as you know marketers know you just search every once in a while and you can through a wrench in your plans. So you know we did a lot of experimentation last summer which was really exciting for our team was really a new way of us doing marketing, previously we had a few people and we all had an expertise area. So you know our guy expert on PR would do that, someone on emails would do that. But we got a small team, you really need to think ok we need to be learning as fast as possible, we shouldn't be doing things just because we have always been doing that. And that was probably the biggest revelation for us and really the hardest thing to let go. Early last year our marketing team was like two and a half people and we were all very workaholic, so it was hard to stop doing things and we will would just work longer hours to try and do everyday.

Kasey Bayne: [15:42](#)

So I kind of had a sit down with the team and said you know what, I do this too so we need to keep an eye on each other so one we're not working 12 hour days, but two also it's OK to say no and we just need to learn quickly if something is working or not working and if we are not sure it's okay to put it on the back burner for now and focus on you know much more experimental mindset and say you know what we're going to like do an Adwords test so we had, we run a very dedicated Adwords test and last fall. We had it done on previous but so we had like a 2 weeks sprint, spent like 20k on Adwords which to give you an idea of scale, it's like 10x our usual budget to just for sure figure out if this thing works or not. Because it's one of those we always kind of talked about, we didn't have a lot of expertise on in-house either so we brought in some consultant to give us some advice, but it was always one of those things was like, oh well if we had more Adwords we would probably get more leads here but it was really interesting to just go all in the experiment. And then what we learned in the end was you know this actually isn't a silver bullet. I'm not really sure if there are silver bullets out there but we found a bunch of terms that didn't work for us they were just too competitive or expensive (...) like this wasn't a gigantic win for us in terms of the numbers but really in terms of learning like hey does this works for us or not? Let's just figure it out for real, instead of kind of you know teetering on maybe we should do it maybe we shouldn't do it and my advice for folks out there is if you're going to test something, it's good to just really test it so you know the answer and you don't kind always wonder if maybe this will work. And also this is great to especially when you're talking to you know your board or your executive team to be able to say you know what, we did

like a really good test, we know the answer for sure. We will come out to this in one year or two and like rethink our Adwords strategy. I mean knowing Google things will be probably different then, so it's not to say that we will not do Adwords forever, but it's just really good to know these are the ones that will make money for us. This is the scale, if we invest one dollar this is what we will get back. And just knowing for sure and that kind of experimentation it's exciting, both as uncertainty and in just learning new things way and getting comfortable with that has been a big change for our marketing team, but it's been really cool to see the kind of experiments we've been running and learnings and results that we've been able to get.

David Abrams: [19:00](#) That's incredible that's such a good example of what you have to do and I think you know we only have so much time in the day so it's critically important that you maximize the right areas. There's so many opportunities in so many different paths to go down. My only question that great story in this wonderful advise is Why ten thousand dollars. What was the mindset between here's the budget that we need to spend as a baseline versus like let's let it run for six months like how did you guys determine what became the budget size or the time limit size that would determine if the hypothesis that you have for that marketing expert would work?

Kasey Bayne: [19:39](#) So it's a combination of things. One I am so lucky to have a data analyst on staff and he works not only for the marketing team and helps us across the board but he is able to tell me when something is statistically significant and this is it is an amazing hire. I definitely recommend it when you get to a point where you really need to invest in marketing and just know where your leads are coming from, multitag attribution, statistic significance and all that kind of stuff. I feel so lucky to have him in our team. But also we talked to a bunch of experts that specialize in Adwords and ask ok how much do we need to spend to like really make this (inaudible) cause we've done a bunch of tasks with like a few hundred dollars here a few hundred there so some expert advice really help us. And just like a very basic level, at this point, so it's fall, how much budget do I have for the rest of the year, what can I move around to just make this work?

David Abrams: [20:53](#) That's great. Well first of all great job to hire a data person that's incredible but makes a ton of sense and absolutely I think know it's so easy to say I'm going to a market experiments or 100 bucks or something. And then there not enough time or not enough significance on the data to get back to really make a determination on where that worked or not but you know a really great example there was with our words on maybe someone that didn't work as well as we thought but probably learn to tone down a couple of keywords work and scale those ones as much as you can. What did work really well. Was there a surprising win that you guys got out of it.

Kasey Bayne: [21:36](#) Yeah so in terms of Adwords like it was great to see what kind of where we could won things in a competitive market. But in terms of marketing in general we had a lot of success with partners and integrations. Especially for

something like chat which is part of a greater system. People don't generally use chat just by itself is either in conjunction with your helpdesk for support or like I have it hooked up in Hubspot (...) so really really figuring out what integration partners makes the most sense for our customers. Like really understanding our target customers times and customer interviews. And like some of my favorite questions are now in the best case situation like if you could imagine your dream world of software where would the data go in and out not just in ours but in all of your other systems and then finding ways to connect with those partners. Like our Hubspot integration has done really well for us, salesforce and a bunch of different helpdesks as well and really figuring out, not just you know building integration and like you know posting to our integrations page but really develop a partnership and find the right partners, I don't want to say it was super easy cause definitely trial and error, some partnerships are going to work better than others, but lots of learning just on what we do on both sides, to bring you know more of our customers to our partner and more of their customers to us. And that's been great because we also found not only just increase in my qualified leads, and sales, higher conversion rate than average but also like larger account size than average which a lot of charges on a partnership agency based. So that is definitely like when you can increase your (inaudible) and that type of stuff certainly is a nice benefit for that. So that's worked really well for us.

David Abrams: [23:46](#)

I love it and we are about to double down on that here in 2018 at Demio. I would love to just pick your brain a little bit more on that and the specific strategies that worked for either your outreach campaign or just you know relationship building process to create some type of strategic partnership. Obviously I think that the initial part is the research to find the right partners are going to work well. But once you kind of get in the door with them what are you doing to build up that relationship and then are you doing a webinars together what does an actual partnership look like.

Kasey Bayne: [24:16](#)

Yes so webinars are a big part of it. We have done like blog posts on both sides. The important thing for us is not just doing like a launch event and leaving it. Like we have these really detailed launch spreadsheets which when we talk more I will send you a copy of this stuff and for anyone listening, happy to post my details, happy to talk about more on this stuff. But so not just thinking of it as a single launch event but really thinking of it okay this quarter when you're doing your planning what are you going to do for you know our five key integration partners so that it's not just a onetime thing but it's something that you really keep going and like really taking the time to educate your partners' customers on where you provide value, how you fit with them and making sure that you're staying true not only to your brand but to the other companies' brand as well. So you want to find companies where you fit well so that your messaging is you know you're able to talk in your company's voice and it doesn't come off as jarring or out of place to the other companies so really finding the companies that are as excited to work with you as you are with them and really just thinking long term. Like your launch is not just a one week, like your relationship is not just a one week

situation. Something you want to keep working and tracking and see how many people are using integration. What type of customers are they. Are they all in a certain industry and maybe doing like a targeted campaign together with a partner company like you know Olark and Hubspot or a marketing design agencies or for whenever you're seeing trends in industry or geography or however you might want to do it, is really be able to recognize that and then be able to out together a plan and saying hey you know what a lot of these people are using us, let's get (inaudible) and here's how.

David Abrams: [26:24](#) Love that that's incredible really really solid advice and I think that strategic partnerships without the idea of using them are just like a promotional source but actually utilizing them as real partners are long term partners. It's a very small little mindset shift but it's incredible. So yeah I really love those grants for Kasey. So let's go ahead because our time here I want to jump forward and take a look at and ask you all about 2018. What are you changing here in marketing and 2088 things that you and the team are going to work on specifically.

Kasey Bayne: [26:59](#) Yes so I think something you touch on before is there so much opportunity out there for marketers right now. It is. It is an exciting time to be in marketing in especially marketing tech because there's just so many different solutions and products out there. And what I'm really focused on right now is keeping our experiment mindset going. So make sure that we are tracking and measuring things. And you know knowing what works and what doesn't. And be able to think about, okay, so that didn't work but why is that? Is just because that channel doesn't work for us or is it because the way we run the experiment... Is it our voice? Really taking it to the next level and say OK is this something that you know didn't work by the numbers but also also you know in a way trusting the expertise of my team and like if someone has a gut feeling this might work I might try it again. If there is a why. So that is a big part of it. And also bringing in experts when we need help. Especially in the start up type of company we are all used to wear lots of hats. But there are people out there specialized in so many different areas. SEO and Adwords is a big one for us. So whether you know you are buying a friend a drink who does SEO stuff or booking a day of consulting time depending on what you need, is worth to talk to people who are experts in the field and get that advise so when you are running these experiments you know you're doing it properly and you're not just wandering in the dark trying to guess if something it's going to work for you or not.

David Abrams: [28:47](#) Totally I'm all about paying for advice because it gets you the solution is so much faster you don't lose time and money. And there is a lot of knowledge others are any places in particular you go to find great consultants or people knowledge?

Kasey Bayne: [29:02](#) Yes. So I think I totally agree with you. Lots of great resources out there. I have to say I'm still a fan of face to face conferences. There's a ton of great



ones. (...)The Hubspot conference (...) Just a great chance to get together with other marketers and you know talk about your problems and see if they have experience or know someone you might be able to connect with. And also just get involved in your community. I've met so many great you know marketers and so it's just you know going for events and you know not being afraid to say like hey this is what I'm struggling with, can I buy a few hours of your time to help me wave through something of this so yeah really good to talk with people and make those connections.

- David Abrams: [30:09](#) So true, it's so easy to stay behind the computer screen but nothing like going to those events and building that network. So that's an incredible advice. Let's go ahead let's switch over to our lightning round questions. These are typically questions I just asked and you quickly first thought that comes to mind you can answer them they're super fun. Let's do it. What advice would you give for early stage companies starting marketing?
- Kasey Bayne: [30:34](#) Know your customers. Know who your customer is. Anyone who would buy your stuff is not a good target customer. So do lots of interviews. Talk with your customer target, test your messaging with them. And really understand what keeps them awake at night.
- David Abrams: [30:53](#) Genius. What marketing skills do you think is vital for marketing teams to improve and build on.
- Kasey Bayne: [31:07](#) Tracking is so important. You need to know where your leads are coming from, what leads are converting, all that kind of stuff. You'll be really surprised by the results and just learn so much. Really helps make smart decisions. Track everything.
- David Abrams: [31:16](#) Based on that then what would be the best tracking tool that you might recommend for marketing.
- Kasey Bayne: [31:23](#) So lots of different options out there. Like (inaudible) ton of stuff like Google Analytics and I also use Hubspot and we use a data tool called blocker as usual. If you're not on the tech side you might need some extra help to get you all set.
- David Abrams: [31:47](#) Great stuff. What about a resource like educational resource you recommend for marketing.
- Kasey Bayne: [31:56](#) There's are so many really good ones out there. And you know what I'm going super basic here and say like jump on Twitter, jump on LinkedIn, if there are people that are doing things you are interested in, don't be afraid to just send them a message and start the conversation. Really just a great way is to reach out to people and ask questions and that kind of stuff. And there are a lot of Slack communities out there as well. I am in one in mean in

one in (inaudible). Just really you know facilitate conversations and make it easy to connect with people and keep up with the industry.

- David Abrams: [32:44](#) That's great. What's a brand, business or team that you admire today.
- Kasey Bayne: [33:21](#) So I will admit I am a giant Hubspot fan girl. Not only the product is super solid but the content and resources they have, not just for the product but to help you be a better marketer from really beginner, intermediary stuff... even if you are not a customer go check out their resource center, Hubspot academy. Other than Hubspot I love what Mailchimp is doing and Shopify. I think that both of those companies just really understand their customer. And just have like a really solid voice and are able to provide really valuable stuff that you share as a marketer whether you are a customer or not. That is great for them and helps building their brand and helping to create evangelists and that kind of stuff. So yeah. Lots of inspirational stuff happening nowadays.
- David Abrams: [33:48](#) Incredible and you've given so much good content in this episode. I'm literally, I'm taking notes because you've given great information, this is probably one of my favorite interviews. So Kasey I really appreciate you taking the time to join me. Take time from your busy day and talking through this and sharing so much knowledge.
- Kasey Bayne: [34:07](#) Perfect. Thank you so much. I really enjoyed.
- David Abrams: [34:11](#) Awesome. Kasey thanks again. And we'll talk to you soon.
- David Abrams: [34:16](#) That was truly an incredible episode Kasey was fantastic and really really brought it on this episode. We'll be linking to some of the resources that Kasey talked about in the episode on the recap page of this podcast which can be found on the Demio blog. Go to Demio.com or Demio.com/learn that is our blog find all of our podcast episodes there. You could also join us in our Facebook community where we continue these conversations. We talk about SaaS and we're really working to build a great community of SaaS marketers and Founders, come join us at any time that's on Facebook. Again this was a wonderful episode. Hope you guys enjoyed it. Don't forget to leave us a rating or comment. We look forward to seeing you on the next episode.

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