

David Abrams: 00:00 Hello, hello and welcome to episode number 52 of the SaaS breakthrough show brought to you by Demio. The SaaS Breakthrough show will be an inside look at what is working in marketing for 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, not be your host today as we bring on Patrick Edmonds, who is the chief marketing officer at Proposify, a web based business proposal software company. Now since joining Proposify, two and a half years ago, Patrick has helped grow three times Proposify customer base to over 7,000 customers in more than five times annual recurring revenue to over 5.5 million. Something we'll talk about in the show. Described as a triple threat Patrick studied marketing, finance, and computer science before starting his career in paid media. Before becoming the chief marketing officer, he joined Proposify as their initial growth marketer and we talk about his journey through the company. He likes to get his hands dirty, digging deep into the data to discover new ways to convert more users and gets his kicks from measurable results.

David Abrams: 01:15 And on today's episode we talk about how he finds his measurable results. We talked about actually how the two founders created Proposify out of their own frustration and their journey to bring him on and when they brought him on. We talked about why sometimes even with a growing company, you have to step back and rethink where you're going with your company and if you need to change possibly direction and with that your target persona, the marketing person there. We talk about the different, the hard parts of growing and changing your sales process kind of midstream while you were already growing, why you have product market fit and how to go from a no touch sales system to a sales team and the process that they had to go through there in 2018. We talk about content strategies and SEO concepts to grow your SaaS. Maybe small ideas or hacks that you're missing right now that you can actually go through to get some measurable results. And then of course we talked about where he thinks Proposify is headed in 2019. Now before we jump in today's episode, I want to let you know that we have a brand new contest going on and it's one that I think you absolutely will want to be involved in. Just for going on iTunes and leaving a rating, a review, and sending us an email to support@demio.com we will enter you to win a Google Home. It's a great device. I have one at home and it's pretty freaking awesome. Connects to all my different devices at home. Can play music, have my business connected to it. It's pretty freaking awesome. But we're going to pick one winner on February 28th. But you do need to send in your rating and review again to support@demio.com so we know who they come from, they come from a username and if you don't send them that email, we won't be able to add you to this contest. Now this will be going to the next 28 days. So make sure you add your rating and review. Now we have a great episode today with Patrick, so let's go ahead and let's jump on with him right now.

Narrator: 03:20 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: 03:36 Hey Patrick. Thanks so much for joining me today on the SaaS Breakthrough podcast. I'm pumped to have you here. Super excited. How are you doing today?

Patrick Edmonds: 03:43 I'm pretty good. Thanks for having me, David.

David Abrams: 03:45 Yeah, it's a real pleasure. Love to learn a little bit more about your journey, what's going on over there at Proposify. but I guess before we do that, why don't you explain a little bit about the company when it was founded, who the customers are, the persona there, and what you guys are doing uniquely in the marketplace?

Patrick Edmonds: 04:04 Absolutely. So Proposify was founded 2014, our co founders, Kyle Racki and Kevin Springer, that time in their life, they were actually running a web design agency. They were doing a lot of sales themselves as the, as the co owners of that business. And they were spending a lot of time writing proposals in the evening or on the weekends. A lot of people have heard this story before, live this life where you're busy all day and you, you had a few calls with some prospects and they said, yeah great, send me over a proposal and you have to say, okay, I'll get, I'll get that to you by the end of the week or I'll get that to you by by next Friday. And that's a lot of time wasted in the sales process where it just, just trying to pull together content and pricing and all of that sort of stuff when you're putting together a proposal. And basically Kyle and Kevin said there's, there's gotta be a better way to do this. So Kyle, our CEO, is actually a designer by trade and he mocked up some versions of what the original version of Proposify was and designed this software that, it helps people close more deals at the end of the day.

Patrick Edmonds: 05:09 So Proposify is a business proposal software. We like to say that we simplify personalized sales. The sales from, from one to one person and help sales teams specifically close deals and close them faster. Getting those, those proposals out in front of your clients eyes a little bit, a little bit faster. Proposify is, I will say transparently, ideally suited for those sales sales teams that are sending out a good volume of proposals if, the basic math in terms of how much time you're spending out creating this content. There's, there's, there's easy ROI there and just in terms of time saved, but what would you like to say, there's a lot of intangible pieces there that have extra value towards people and words that we've heard directly from our customers that have helped them actually close larger deal sizes or custom customers that they weren't used to closing before or up against competitors that, that they didn't think they would win the deal with.

Patrick Edmonds: 06:04 And having a streamlined proposal experience, a experience for their clients in terms of, delivering a beautiful proposal and having it in front of their hands really quickly signing it off online without having to do any of the pain of any third party digital signature software or even scanning and signing and printing and scanning people are doing that anymore. I'm not really sure what's a decade we're living in, but just creating that streamlined sales experience for the client at the end of the day, can, can lead to big dividends at the end of the deal and just in terms of your average deal size and, the kind of clients that you're going after.

David Abrams: 06:40 That's fabulous and that makes a ton of sense. And it's another great example of a story of someone having a problem in going to solve it. And then kind of figuring out, okay, now we need to figure out who the perfect kind of persona is there. And we'll talk about that in a little bit. But, just to kind of get a frame of reference, when did you actually join the team? And what was maybe the company ARR or customer size at the time of joining?

Patrick Edmonds: 07:03 Yeah, that was, it was May, 2016 when I joined, so I'll be coming up at three years this May with Proposify, it seems like it was just yesterday, but, I was lucky enough to kind of join the company when they're already starting to get a good amount, a good amount of traction. Just hit 1 million ARR when I joined. and and over 2000 customers at that point in time. So it was a nice, me being kind of a data nerd, it was, there's a good amount of volume going through the company to learn from, to improve upon, which got me really, really excited when I started to join.

David Abrams: 07:38 That's incredible. And so in your three years, probably a ton has changed and we'll talk about some of the initiatives that you led the team through. But when you first joined, what was it like? Was there a marketing department, we're you coming in as kind of the first data driven marketer? What's the initial focus when you join a team at a million ARR already, what's the first marketing initiative to take on?

Patrick Edmonds: 07:59 Yeah, absolutely. It was a growing, a growing time for the company. I think we hired about four people around the same time that I started and that was when the company was only eight, around eight or less than 10 people and we, there was already, we already had one marketer on the team, Jen, who's, who's still part of the team. She is our chief communications officer and at the time she was hired as the only marketer to really create the brand and the positioning of what Proposify has evolved to become and Kyle, our CEO at the time was looking to kind of offload some of the work that he was doing and some that others in the company we're doing from a data perspective and some outsourcing that they were doing. So he put a job out there for a growth hacker. Anyone listened to this podcast probably knows the idea of the growth hacker, but in the market that we're in, that's probably was a strange and different title, then people were people were used to hearing just in terms of a chief marketing officers or digital marketers or digital marketing specialists, that sort of thing, and he really wanted to find that sort of person that could dig in and analyze the data and move the company in the right direction just from a, from the one metric that matters, your north star metric, whatever you really want to, whatever you want to call it, or just revenue at the end of the day. So I joined as a growth marketer or growth hacker with Proposify and when, when I had joined, I would call myself a kind of a t shape marketer at that time. Do you, have you heard of what a t shape marketer is David?

David Abrams: 09:30 I have not heard that. What is that?

Patrick Edmonds: 09:31 T Shape marketer, when you're talking about growth hacking, I'm forgetting if that term specifically was coined by Sean Ellis who coined growth hacking or not, but it's the idea that you have a broad set of skills across the top. So the top of your kind of capital t, whether you know a little bit about content marketing, a little bit about SEO, a little bit about paid advertising, about analytics, a little bit about persona, creating personas, a little bit about creative and design and maybe even a little bit of Dev and coding skills on that as well. So you know how to speak all of the languages. But it's really hard to say that you find one marketer that could do all of those different things. I honestly don't think you could find a person that would be excellent at all of those at every single one of those little niche parts of marketing. So my other part of the T, I'd say that from the deep part, I was deeper in paid advertising and analytics coming from a paid media agency previously. And it was actually funny when, when I joined Proposify they, I think they assumed I was going to go come in and take over all of the paid advertising that we were doing because they were, they were outsourcing that at that time. And I asked them, hey, let's, let's keep outsourcing that for say I don't know, the first six months or three to six months or something and I want to go deep down into, into everything else, like what are the things that can really move, move the needle. So I went heavy in on SEO and in our content strategy, how to align keywords, technical SEO on the website, how to optimize that because I saw that as being a kind of the lowest hanging fruit, the thing that I could make the most difference on quickly. And I actually honestly at the time didn't know that much about it. So it was, it was exciting for me to join a new company and actually start doing something that I, I hadn't implemented before.

David Abrams: 11:15 So you were able to add a couple new pieces of value in there with the SEO initiatives there. I guess that's really interesting that you had so many different areas of expertise and that's where you kind of dialed in on because that's a longer term thing. Typically that's something that you want to have like a long tail strategy for rather than like a shorter growth hacking, you know, let's get growth in the door right now. Yeah. But that makes a lot of sense.

Patrick Edmonds: 11:40 Absolutely. And when I started, the company has already had a million ARR like they were doing pretty good and Jen on our team was writing tons and tons of content and Kyle himself was writing a bunch of, a bunch of blogs, but I guess the recommendation I would make to people out there is that, yeah, get that content started early, but you really still need to do some work on optimizing that. So I had a nice. I identified that there was, there's a lot of

content there to work with. There was a lot of traction, in terms of our foothold. We were already organically ranking for a lot of really, really good search terms with little effort put in place so that was kind of lucky to be perfectly honest. but then just a few little little tweaks and modifications can, can really pay dividends at the end of the day.

David Abrams: 12:25 Any secrets you want to say that you, found in the, in the kind of tweak area there? Anything that people can, can learn from you?

Patrick Edmonds: 12:32 Oh yeah. It's the nerdy details of things. I mean, we're, there were trying to write good content is always recommended and that was already being done, so that's great. But we had, there was no alignment on the url slugs on meta tags or, or the descriptions and inserting keywords into that pretty pretty simple stuff for like someone who's focused on SEO, but if, if that's not what your expertise is, there's kind of no way you'd get to know that. So just focusing on the basics, run your site through one of those simple like SEO audits and see where you're failing. It'll give you a give you a good idea of at least where to start. And that's honestly all I did was just the low hanging fruit, the fruit, the simple things that you could fix and make a little bit better.

Patrick Edmonds: 13:17 If you, if you started that foundation of content, make sure you're focusing on not just, yeah, obviously creating, writing good content that people want to read and people want to want to look about, look at and read, but those kind of little backend technical details as well.

David Abrams: 13:32 That's super helpful. I think we're kind of in that same boat where we got a lot of good SEO success, but we're 100 percent focused on SEO and beginning of this year we're making that focus on content and SEO. And so when we do go through those, I think exactly it's like you said, it's like we found little areas that you can just add improvement to see a great return, but it doesn't take a ton, the key thing being the content. And we'll talk about content and what you guys are doing there. what I want to do is just kind of take a step back through the process. At the beginning of the interview you talked about your customer persona, but I want to know maybe a little bit more. You're joining at 1 million ARR, so you may already have product market fit, but when me and you talked, you talked about an evolution of that target market, what does that process look like? Are you guys or have you had to shift your persona along the way?

Patrick Edmonds: 14:23 Yeah, just this past year. So it's really where it's kind of the shining light moment of us opening our eyes a little bit about, about how we might be able to improve. It's a, we had the luxury of, of a company where things aren't broken. Things are growing very, very well, but we want to continue to, to succeed and do even better. So we had to take a step back and a little bit and look at the long term success of the company and where we wanted that to go. And I was lucky when I started at around 1 million ARR. I've definitely hit the definition of product market fit. Saw that initial hockey stick in terms of growth numbers, but still not to the scale of some of the hyper hyper growth SaaS companies that you see out there today. The two things, I mean, I dug you quickly into this when I started at the company that to see like, okay, what's, where's the traction really coming from what's really making the difference and the two key things that I can just flat out tell you what they were, were it native integrations, integrations with software that was like ours because we're a proposal software company. We live in the sales space. So we live kind of between CRMs and accounting software or project management software fulfillment software. So on the top funnel of sales you've got, you've got lots of software out there that's doing client acquisition and client management CRMs. But when it comes down to closing the deal, the proposal software fits in there nicely. So having a native integration with your CRM, whether that be Salesforce or Hubspot or Pipedrive or Zoho, it made sense to be able to have native integration with those to sync your contacts over, to populate proposals with, with variables to just streamline

that creation process with Proposal. So a lot of traction there. It's nice to kind of hit your wagon to other companies that are succeeding to a certain degree and say, Oh, I'm the customer believes I'm using this software and I, but I still have problems with proposal. Oh, it's got a native integration. That's perfect. So that was really, really helpful in terms of the growth of the company.

Patrick Edmonds: 16:22 And the other one is actually a little bit of an SEO play a bit is our proposal templates. So it's, we have proposal templates that are built into our software that we give away for free. They're professionally designed and written, but in order to access those, you actually get to kind of put into a free trial. So I think of them a little bit like a lead magnet where instead of it being a white paper or an ebook or any of those sorts of examples of a kind of exchanging your email for a piece of content we're designing and writing proposal templates for people that they can use for free 14 days on our free trial and, and also demonstrating what the software can do for you. So there's kind of a bunch of different benefits there with the proposal templates where they are their lead magnet, but they also demonstrate the product and they also, kind of have an SEO play there were people who were looking for various industries have proposal templates are searching for that while they're having problems with their proposal process. And then they ended up finding us either organically or through some, some page search.

David Abrams: 17:27 Those are killer, really appreciate you sharing those. I love both those initiatives and especially the template idea. I think I'm going to maybe modify that and find some way to utilize that on our end. So yeah, appreciate you sharing that.

Patrick Edmonds: 17:40 There's tons of great, great examples out there, people doing, doing templates, it's the whole idea of a lead magnet is an exchange of value, so you give them something of value and they give you something of value, which is their name and their email and the right to contact them, depending on what country you're in and GDPR regulations and all that sort of stuff. But, that's, that's the idea is let's give something away, give it to make it be valuable and they'll return that favor as well.

David Abrams: 18:07 So with those initial, I guess growth initiatives that you had, you were bringing in a lot of sales with a light or no sales touch point really with the software. and then you said you kind of had this change of the last year and your target market, now what does that look like? You said you're going after people who are doing a higher influx of templates of actually sending out proposals. does this change your sales process internally? Are you guys still no touch?

Patrick Edmonds: 18:37 Yeah, it definitely, it definitely changed and we're a little over a year ago, I'd say we're almost 100 percent low touch. People would come in via a 14 day free trial. There's no credit card required for the free trial. Go in, try it out. If you see the value of saving time and winning more proposals and having a beautiful client experience with the beautiful proposals, then you get the value proposition and it was pretty simple for people to sign up starting at \$25 per month. And that was an easy, easy sell for people who aligned with that. The problems that Kyle and Kevin are co founders had when, when they were running their other company, when they said there's gotta be a better way to do this, that we had a lot of good traction. People were relating with that messaging to say there's got to be a better way to do this and, and Proposify is that way. The one thing that we, that we came up with is that that pain point resonates across many different industries and many different types of people. Where it starts to fall off a little bit are the types of companies that only send out a handful of proposals say a year, where they, it's the CEO or the owner or the president of the company, they're doing most of the sales because they have less than 20 employees total. They don't have a sales team. It's, it's on them. So there are a lot of marketing agencies that fall into that. A lot of consultancies, even even law firms or accounting firms or IT consultants, that sort of thing that, that were more mom and pop shop type of things. They definitely aligned with the idea of creating a better proposal experience and saving time doing that. But when

they created the proposal, sent them and then they won the business, their brain shifted a little bit where now they're in fulfillment mode. They're the, they're the CEO of the company and, and also the VP of sales. They did the sales job and now they took off their sales hat and went into the fulfillment space and started doing that business. And maybe not focusing as much on sales and scale and growing their company.

Patrick Edmonds: 20:38 So at the same time when they take off their sales hat and put on their fulfillment hat, they stopped thinking about the value of, of what a software like Proposify can add to their team, and, and so we saw a slightly higher churn rates from some segments that look like that and identify that, okay, these people like us, that's great. But at the end of the day, we, we survey customers that leave and the majority of the feedback that we got was they just don't have enough proposals to write or that their, their businesses into scaling or growing as fast and they don't want to pay for the service on a, on a monthly or an annual basis to it to make for that to make sense. So with that, it's a, we're like, okay, well there's not a lot we can do to change that other than continuing to create content for these people to, to help grow their businesses. We did a lot of that, a lot of helpful information on how to scale your company, how to grow your sales, but the next step for us was really to look in and try and find organizations out there that, that are doing, already scaling their sales. They have positions, VPs of sales, sales managers that are, that are actively managing a team of people that are pushing out proposals and signing contracts on a, on a continual basis. And they also align with the kind of value proposition of saving time and sending beautiful proposals. But they also then have the, the volume of proposals to send at the same time.

David Abrams: 21:56 That makes a ton of sense. So now you have to go through a process of more outbound, maybe account based marketing or are you doing a pure sales? You have to bring in a sales team. How does that change? And from the marketing team, how do you guys now, build out a process to integrate them in? I'm sure that's a bigger process than just saying, hey, we'll get some sales people. And I mean, it's getting them up into the, you know, the data systems, understanding the customer personas and then you're there from the lead and marketing to kind of put it all together. What is that?

Patrick Edmonds: 22:26 Yeah, absolutely. It's definitely a challenge. And I wish best of luck for anyone else that's out there and facing those same, same same challenges, but they're exciting challenges to have because there's, for us at this point, it's only additional opportunity for us to serve a larger customer base. What we decided is that we, we definitely want to continue serving our existing customers that love us and we really want to see them scale and grow. But at the same time, if we can go there and find companies that are sending more proposals, we want to do that. So it did start with adding a few sales people to the team and see how that went just, but they were doing manual qualification. They were doing very manual going, going through all the lists of any lead or any free trial that would coming through. And it didn't seem scalable. It didn't seem that we could, we could grow our team that way way, even though we had a good volume of leads and traffic coming through for free trials and people downloading our lead magnets upwards of like hundreds per day, and that created a problem of just scale. We couldn't go through and qualify and those sales people couldn't talk to every single one of those leads coming through the door because it just didn't make financial sense. Even here you're paying a salesperson to, to close a certain level of a deal if we're only charging \$25 a month for that, it's sometimes hard to make that, that payback and scalability of growing a sales team. So what we needed to do and our first major steps in something that the better part of this year we've been been working on is just better automated lead scoring.

Patrick Edmonds: 24:01 We having the volume of leads coming through, we knew that we could, that we did have a lot of the right target persona coming through our funnels, but we just weren't qualifying them and we weren't identifying them effectively in order to pass them over to sales. So a lot of tech changes on the background. A lot of data changes in terms of our systems

bringing on a Salesforce CRM, Marqueto marketing automation and lead scoring...

David Abrams: 24:26 I was going to ask what you're using.

Patrick Edmonds: 24:27 Yeah, yeah. Using Segment to pass app activity and usage through to various platforms that we're using now. Leveraging Clearbit enrichment information to enrich the leads that are coming through and inform what our lead score ends up actually being. So a lot of the changes are, are, are on the technical back end, leveraging kind of our, our funnels that are already working and already delivering traffic through but really identifying and pulling out the customers that we see could be having additional value, using Proposify and aligning them with, with the appropriate kind of, I like to call it white glove service, but having a, having a salesperson and a customer success team, really bringing them through and onboard them into the software.

David Abrams: 25:12 Did you guys already have those qualifications made or at least the lead score you wanted them to get to and then you just kind of backtrack what actions would take them there or how did you initially set up that process to say, hey, this is a qualified lead that can now, is now appropriate to go to a salesperson?

Patrick Edmonds: 25:28 Yeah, we had a lot of assumptions that we tried to validate or not. We created before we brought in Clearbit for example, to enrich more data, we would ask them survey questions that were, that were kind of surrogates for how large is your team and what's your volume of proposals that you're sending and tried to relate that back to what a score could be. We found out that people in general don't fill out those surveys very accurately. So the, the sales team was still having a really hard time kind of identifying and pulling out those people, but we did translate that idea over to make it more robust, using Clearbit enrichment to find job titles, industries, company size, revenue, and align those with a kind of an ideal customer profile and persona that, that, that does align with a customer that, that will be sending a larger volume proposals and sending, sending out, having a larger sales team and, and putting that together. And it was really a lot of back and forth between kind of our marketing automation team and our SDR sales inbound team as to say like, okay, let's look at these leads. Who's qualified? Who's not. Let's look at them in mass and see, okay, what, what identifying points based on their actions within their free trial might identify them as being higher qualified and combined that those action based activities with the demographic based activities of our information from Clearbit.

David Abrams: 26:54 And then to add another layer of complexity on top of that, I'm sure you guys are also looking at the channels of acquisition of where those people are coming from. When you go through this kind of up market change and you change that persona, you bring in the sales team, you set up all the qualification forms. Are you also looking at where the prospects are coming from and then does that then shift the marketing focus and initiatives for you guys to double down on?

Patrick Edmonds: 27:19 Well, a little bit. There's not a lot changed globally with say the channels like we're doing what a lot other SaaS companies are doing from channel based perspective. Like we have organic content, blog posts pushed out every week, paid advertising in terms of paid search, paid social advertising, Facebook, Instagram, LinkedIn, review sites, that's that sort of thing. what changed though was more of the messaging and the and some of the targeting within those channels. So the global channels stayed pretty much the same, but the way that we were speaking to the audience changes a little bit as we kind of move up market so to speak. Something that we aligned with pretty early is that we, we didn't want to, just ignore the customer base that we've had so far, but make it a little bit more aspirational where someone, someone may still want to grow into, become that company that has a larger sales team or has a more efficient sales process or maybe they're looking to hire their first sales manager or VP of sales. So the, this,

this alignment with our messaging where you can speak to an audience that might be a little bit larger and align with their day to day, but also aligned with the aspirational nature of, of another company that might be just a little bit smaller than what they are and help them grow to, to that perspective.

David Abrams: 28:37 I'd love to see an example of that. Maybe you can send one over after the interview, we could put it in the resource segment. I would love to see what that looks like so you can appeal to both, because I think that's super interesting and very helpful for people that are going up market so you can still talk, without lose the original customer base that you have. You just kind of shifting their perspective.

Patrick Edmonds: 28:56 Definitely. Yeah we broadened out a little bit in terms of industries, but when a lot more specific in terms of the topics that we're talking about. So previously we were talking to a lot of marketing agencies. We'd have a lot of content about agencies. Our CEO Kyle had a podcast called agencies drinking beer, which we ended up rebranding, rebranding that a little bit, but now we're really focused on, on sales, sales content or that sales manager, and where we fit into the entire sales process.

David Abrams: 29:24 I love it. It reminds me of the same kind of change that we had to make here. So I totally relate to it. I think it's a well done super Smart. And you mentioned content, I want to talk about content in B2B I think is one of those very difficult things. You're talking about selling proposals or just sales strategies. It's hard to a lot of times bringing in like creative or exciting concepts into that. And as we work through our own content initiative right now, I'm like struggling to figure that out. How do we make this stuff really fun and exciting? How do you balance the data, the SEO stuff, the things you know you need to have in a post and you need to get out there with the creative approach to bringing engagement and excitement and fun into content marketing. You guys, for instance, have an amazing copywritten headline, the blog, this blog is for closers only. I love that. And you know, I was talking to my co founder about that, like kind of your copy and how you were just direct to your segment. You really just spoke their language instantly. What, what are some insights maybe you can share on this whole process and how you guys have been able to really. I guess when in content marketing so much?

Patrick Edmonds: 30:38 Yeah, I'll start off by saying I'll give credit where credit's due, where I've talked about before. I'm definitely more of the analytics guy and data guy in our company and I mentioned Jen earlier our chief communications officer and we'd like to say that we're the two headed beast of marketing, two headed dragon or, or the right and left brain of marketing where the right more creative side. So, Jen is a copywriter by trade and positioned the company well created the brand, the messaging, working on, on defining the more psychographic levels of, of what the personas are, how to speak to them, how to speak their language. That's. I had that luxury of being able to partner with someone on our team that specializes in that. And then I can support that content as much as I possibly can with, with any data and insights to say, okay, this content was performing better than that one, or this group of keywords has an opportunity here that we, that we could really align on where we could improve upon. So having that right and left brain side of, of your team, whether that comes directly in your marketing team or it's someone else within your organization that can, can help with that. I think that the line, the blog is for closers only actually came from Kyle our CEO. It didn't even come from Jen or myself. and he got that kind of a feedback from someone else who, who said use your headlines and use your copy to qualify your audience, which is something I totally resonate with and I'm not a hundred percent sure if I'll give all the credit. But I believe Dan Martell, I don't know if you know, he is, he was, he ran a brand company called Clarity and Flowtown. Sold those now does SaaS consulting. He's a big advocate of, of this kind of qualifying with content and making sure that you align your messaging and you're speaking directly to the person you want to be speaking to.

Patrick Edmonds: 32:27 So you can do a lot of cool stuff with that by saying, okay, if a person read this blog post and I started it off with this blog post is for this very niche persona and someone read all of that, they just qualified as being that persona. Say this blog post is for VP's of sales only or something direct is that, and then you can use the analytics and the metrics to say, okay, anyone who actually got to the bottom of this page are spent x period of time reading this content. I now know something about this person. This is 99 percent sure that if they resonated with this content, then they fit into this target persona and then you can offer them another piece of content that that is similar and kind of work them and nurture them in your marketing funnel and they basically qualified themselves just by them reading the content that you wrote and positions specifically for them.

David Abrams: 33:16 That's super interesting. I love that. When you guys are first starting content, are there distribution channels that you like wanted to rely on? Are there new distribution channels I should say now maybe with your new, persona that help you then bring in the right people are then qualified by how much reader, how long they are on the blog?

Patrick Edmonds: 33:35 I'm experimenting a little bit to be perfectly honest, I haven't seen a lot of difference in change, like spending a little bit more on LinkedIn, thinking that the targeting based on job titles and more of B2B specific space might pay a little more more dividends, but actually finding the cost per conversion actually being a little bit higher. I'm a big fan of what you can actually do on, on Facebook's ads manager used to be called power editor. I think a lot of people discount that for B2B marketing, because you think it's a personalized platform, but I've seen it work for a number of other different companies where as long as you align the messaging and the targeting correctly, if that's where they're spending most of their time from, from absorbing media. if most of the time is spent on Facebook or on Instagram then put the messaging there. I mean, that aligns with really anything. If your, if your audience spends most of their time reading Reddit, then post your stuff to Reddit. If they're answering Quora articles, then post your answers on Quora. Just it goes back to kind of fundamentals of, of media buying, which is kind of my, my original background is find out who your audience is, find out where they're spending most of their time and where they're placing their eyeballs and be there. For us, it seems to work on, on paid social, but for anyone else out there, it's where are they spending their time? Where can you put your message and put it in front of them there?

David Abrams: 34:56 I think it's so true. I think you're smart to say that because I think a lot of things that work for you or your business can't always work for another business and it's about experimentation, but more so knowing the persona. Who are they, where are they, what are their pain points? How can I get in front of them? So, well said there. But that's amazing and it's just really great to hear it. The left and the right brain together, and I guess my question then to you would be with you two together in the marketing team, growing the company since 2016 when you joined in May, where have you guys grown the company to? How has it grown?

Patrick Edmonds: 35:30 It's exciting to see where it's gone. So right now we're at about 5.7 million ARR and, over 7,900 customers.

David Abrams: 35:39 Congratulations. That's incredible. Really good job guys. That's amazing.

Patrick Edmonds: 35:42 Yeah, thanks.

David Abrams: 35:45 Yeah, no, that's amazing. And I guess looking forward then, you know, here we are in the first month of 2019, looking forward this year, what are the challenges and

opportunities that you're looking forward to or maybe that you see changing in the industry?

Patrick Edmonds: 35:58 Those are always the, the open end question where we want to go this year. It's, we see a lot of opportunity in the market and we really just want to make sure that we're not, we're not missing out on something that, we tried to create a good brand around our product and built a very, very strong product that our customers seem seem to love. So I always feel from a marketing perspective, it's, if, if I don't leverage that then it's my fault if we, if we don't get the, get the word out there to everyone else. So, we spent a lot of the last year doing a lot of fundamental things in terms of introducing new software in terms of that lead scoring, bringing on sales teams, improving and leveraging the funnels that we already had. And this year I definitely want to focus on what, what else is there, what else can I be doing that, to, to change it up a little bit. Now that we've kind of hit our stride with our, with our, new fundamental background kind of, we were rebuilding the ship a little bit as the ship was, was, was in the water. And now we're headed in the right direction with the brand new ship, headed in the right direction. I just want to find out, okay, where are those new opportunities where, where are people spending time, where their eyeballs that I can, that I can change and do things differently. I don't have a lot of answers of where that actually is. Some experimentation for sure. In terms of other paid channels, I mentioned a Quora as like a, as a good opportunity for people answering and asking questions, I might test that out a little bit. Not sure if there's any alignment in any other channels like like Reddit. We will be spending a lot more time getting to know other people in, in our space. Going to Saastr next week and going to try and meet a bunch of other CMOs in this space and try and get, get some new ideas from, from people who've done it before. Similar size that we are. If anyone kind of fits that mold and wants to chat more about marketing, please feel free to reach out to me. I always love talking about this sort of stuff. And yeah, learning from the best and trying to implement it for, for ourselves.

David Abrams: 38:03 That's incredible. And if I was going to Saastr this year, I've gotten in the past few years, I would definitely buy you a beer there. It's a great time to have a ton of fun, but that sounds, you know, very much so like a lot of, I think SaaS companies that are, they're getting momentum, they're coming back, they're redefining a lot of things. They're making the shifts, changes. So you guys are in a great place. You know, you have really good product market fit, you're just trying to adapt and grow and I think, you know, this is going to be a really strong year for you guys and I would love to know, maybe we can circle back in a few months, hear how some of the new initiatives have gone, how the sales process is improving. I would love to hear all that stuff. One thing I would say is that we experimented with Quora, spending a lot of time answering questions and stuff like that and where we got a lot of traffic from was actually, not just answering questions, but their advertising platform was pretty awesome because you can segment to specific topics or you know, questions in words in topics so you can look up a post that have, you know, the word proposals in it and stuff like that. And then, actually go in there and have an advertisement for your product right there, which is pretty cool because people are in there because they're interested in the topic.

Patrick Edmonds: 39:11 Thanks for the recommendation.

David Abrams: 39:13 Yeah, definitely. But, what I want to do now is I want to switch over to the lightning round questions, just five quick questions that you answer with first best thought that comes to mind. It's a ton of fun. You ready to get started? What advice would you give for early stage SaaS companies starting marketing?

Patrick Edmonds: 39:29 I would, I would do a, do what I couldn't do because I didn't start at the very beginning, but get that content funnel running running soon, because when I joined later in the company and they already had that, started it, we were able to just leverage it. So start creating

the content, start building your, building your brand and building your kind of domain credit with Google as soon as you possibly can because it only pay dividends down the road. And I'd say also stay away from like shiny object syndrome, when there's so many things you can do at the very beginning. I've been talking to a few other people locally, starting startups now and they always want to try this and try this and try that. Create that one funnel that works and optimize that and get to your product market fit place and really hone in on, on what will work for you guys.

Speaker 4: 40:16 I love that. I call that the Shiny Strategy Syndrome where every strategy is, looks so cool and different and you lose focus, but great advice. What skill do you think is vital for marketing teams to improve and build on today?

Patrick Edmonds: 40:29 Something that I'm trying to align with our team is just aligning on the metric that matters within your team and your department. Yeah, the, there's a company wide one obviously. Usually it's something to do with, with revenue or activity in whatever your platform is, but right now for our marketing team, it's, it's pretty boring, but it's MQLs it's making sure that those qualified people are coming through that, that the blogs that we're writing are resonating with that audience, that they're coming through, the right people are starting free trials and then we can create valuable conversations that our sales team can have good conversations with those sorts of people. So just aligning your teams with that one thing that you know is going to move the needle.

David Abrams: 41:11 I think that's very helpful too. And I think like you said, there can be company and then department, but that's very helpful. What about a best educational resource you'd recommend for learning about marketing or growth?

Patrick Edmonds: 41:21 One I just came across and I can't believe it took me so long, everyone probably knows this, but Aaron Krall SaaS growth hacks. He's a Facebook group, I think it's almost over 12,000 people in there and oh man, the posts that are coming out every day on there are awesome. And another one I'd say someone I got to meet in September at Inbound was Ed Fry from Hull.io that he's got some great stuff. If you're, if you're looking, talking about lead scoring, talking about like the data side of marketing Ed knows that stuff for sure.

David Abrams: 41:55 We'll definitely have to reach out to Ed to have him on the podcast. We've had Aaron on, we're part of that group and it's a great group, SaaS Growth Hacks. It's a great group. And yeah, Aaron works with Demio (inaudible) is an incredible guy. Super Smart. So yeah, good group to have. But that's fantastic. What about a favorite tool you can't live without?

Patrick Edmonds: 42:16 That's a hard one. I'm I'm pretty tool heavy in our marketing stack. I'd pull it back to, we use Chartmogul, all of our SaaS metrics, but there's Profitwell, there's Baremetrics, there's a bunch of others that are out there aligning what you're doing as much as possible with your, your churn metrics, with your, your customer growth, net MRR growth, pulling your activities and bringing it back to the actual SaaS metrics that matter at the end of the day. I keep a close eye on all of that sort of stuff all the time.

David Abrams: 42:49 Yeah, really, absolutely loved that. We're, we're users of Baremetrics, Chartmogul we play with. It's a really great platform, but they're all pretty similar in what they do. But, two different great platform, especially had Corey Hanes, I think two podcasts episodes ago from Baremetrics on here. What about a brand business or a team that you admire today?

Patrick Edmonds: 43:07 Well, yeah, I know you had Drift on your, on this a little while ago. They're, they're killing it, hypergrowth company. It's amazing what they've, what they've done in in, in a short period of time, so all the content, all the content, they're putting out. Dave Gerhardt,

killing it on LinkedIn. I think he did something I really appreciate. He did a month or 30 days where he acted as a salesperson within the company just to learn what it was like to be that person, but also it aligns with their target personas. They're selling, selling to sales people similar to what we're doing, so just stepping into the shoes and learning that. I love that so much.

Speaker 4: 43:45 So really good point. Yeah, that's a really good idea too and just a thing that you can do inside your company for different departments to really kind of align back on, as we talked about before that north star metric.

Patrick Edmonds: 43:56 Yeah. Something I used to do, our team does a lot more is support days within our organization. (inaudible) Half days you just jump on and help the support team with the Q, you get from marketing perspective, you get to learn the words that they're using in context to your business. For developers, it gets to see how the product is actually being used every day. I think to kind of wherever you are in the company, jumping on and and talking to your customers or even chatting to them on a live chat can definitely give you some good insights.

David Abrams: 44:27 Absolutely love that. Especially if you're a customer centric, you know, value centric company and you really want to just make sure that everyone's aligned behind the customer value system. What are they getting away from the product? What they like, what they don't like, stuff like that. So that's amazing. And Patrick, I just want to say thank you so much for jumping on this podcast, sharing so much. Great information. You shared a ton. You went above and beyond, so thank you so much and appreciate all your time.

Patrick Edmonds: 44:52 Oh, no problem at all. Thanks for having me.

David Abrams: 44:54 It was a real pleasure. And we'll talk to you soon Patrick.

David Abrams: 44:57 I just want to give a big thank you to Patrick and the entire Proposify team for coming on and sharing so much. Patrick did a great job of coming in and being very transparent, open, really telling some of the tactical and strategic methods of what they're doing over there. I really liked a few strategies that we're going to take in and try here at Demio as well. Now we do these shows, we run this podcast to help bring more information to our marketing community, our SaaS marketing community, give more tactical in the trenches, ideas and experiments from great companies, so make sure you guys are writing down notes and taking advantage of these different perspectives, seeing in which ways you can possibly manipulate, manipulate these tests to work for your company. There's all kinds of different things you can do and it's not going to be a one size fits all. You're going to have to test and play with something that we talked about in today's episode. If you enjoyed today's episode, definitely go over to iTunes and leave us a rating and review. We do have a review contest going on right now where we will pick one winner at the end of February on February 28th (2019). One winner will be selected to win a full on Google home device. It's pretty fricking cool, so I want to make sure that you get entered to win a. You do need to email over a screenshot of your review and your ratings so we know who they come from. Now when that day comes, we will reach out and I will make a podcast episode to honor the winner and I want to make sure that it's you and if you want to **hear any more episodes here, read the show notes or see the show notes from past episodes, head over to learn.demio.com** That's our blog. We are fun. The SaaS podcast and all of our recent guests and if you want to continue this conversation, you want to talk to those guests, come **join us in that SaaS breakthrough community**. It's a free Facebook community all about SaaS. Now you can get there by going to **Demio.com/fb** There'll be a link for you to join. It's a free group. Nothing to do. Just come on in, add some value, and we look forward to seeing you there. I want to thank you again for listening to this episode, listening to Patrick and I and have a great day.