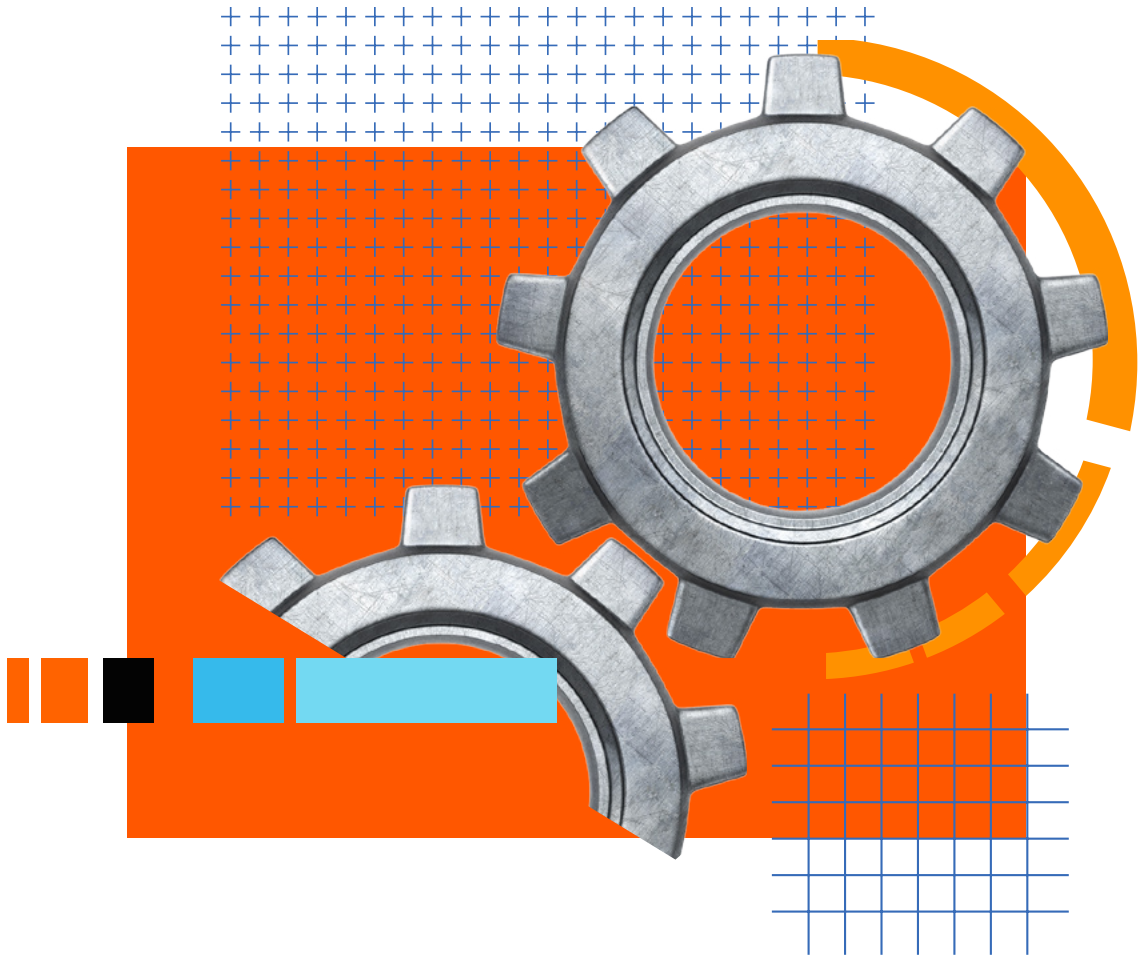


Idea book

# Openprise App Factory



# Introduction

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This guide is designed to inspire you to use Openprise App Factory to its fullest by showing you examples of applications in use today.

## What is App Factory?

Openprise App Factory makes it easy to search, report, graph, edit, share, and load RevOps data without writing any code. App Factory lets RevOps teams create custom self-service apps and specific business processes tailored for each team, including demand generation, sales operations, professional services, channel marketing, product marketing, and community—making data more accessible to more people in ways that are easy to consume.

## How does App Factory work?

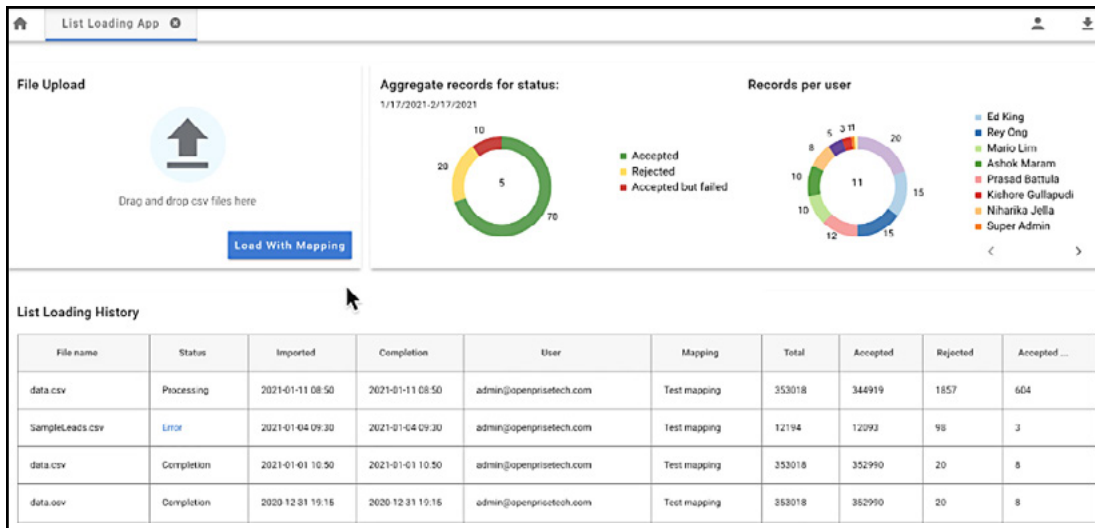
Once you've automated data and processes in Openprise, you can build custom apps in App Factory in as little as five minutes. You can easily tailor apps for different end users and the specific challenges they face. App Factory self-service apps deliver continuous, anytime support for your users' go-to-market initiatives.

## Let's get started!



# 1

# List loading app



The field event manager quickly uploads leads using a list loading app during a three-day field event.

## Challenge:

A field event manager, who doesn't have access to Marketo or Salesforce, wants to load leads into the company CRM several times a day during a three-day event so the entire sales team knows who stopped by the booth and can strategize about follow-up while the event is still taking place.

## Solution:

Frequent list loading is easy with App Factory. Now, sales reps can see which prospects have stopped by the booth, and invite the top prospects to a private dinner with senior executives taking place at the event.

## Business impact:

The sales team identified hot prospects they've been targeting for months, and those prospects bonded with the executives over dinner. As a result, the company had a competitive edge, and won more than \$500k in revenue from that event.

# 2

## Marketing attribution app

The screenshot shows a 'Marketing Attribution' application interface. At the top, there is a 'Search Criteria' section with an 'ADD FILTER GROUP' button. Three filters are applied: 'Campaign Name' matches 'Amazon Gift Card', 'Attribution Type' matches 'Multi Touch', and 'Campaign Is Active' has a value. Below this is the 'Search Results' section, which indicates '15 Records Found' and includes a 'Download' button. The table columns are Campaign Name, Attribution Type, Opportunity Name, Attribution Amount, and Opportunity Total Amount. The table contains five rows of data for Amazon Gift Card campaigns using Multi Touch attribution.

	A	B	C	D	E
	Campaign Name	Attribution Type	Opportunity Name	Attribution Amount	Opportunity Total Amount
1	Amazon Gift Card	Multi Touch	Genetec	15,000	30,000
2	Amazon Gift Card	Multi Touch	Keypost - MKTO/SFDC Data	30,000	30,000
3	Amazon Gift Card	Multi Touch	Lenovo SFDC Data	10,000	30,000
4	Amazon Gift Card	Multi Touch	0x0	9,000	45,000
5	Amazon Gift Card	Multi Touch	Emerson Automation - Eloque Data	30,000	60,000

### Challenge:

A demand generation manager wants to understand the effectiveness of all active Amazon gift card campaigns to determine whether they're generating positive ROI.

### Solution:

App Factory campaign attribution showed three active gift card campaigns contributing more than \$600,000 in opportunities, proving that the investments are worth their upfront costs.

### Business impact:

Demand generation quadrupled the spend on their Amazon gift card campaigns and created more than \$2 million in opportunities over the course of two quarters.

A demand generation manager can quickly see how the active Amazon gift card campaign is progressing.

# 3

## Recent website visitors app

The screenshot shows the 'Recent Website Visitors' app interface. It features a search criteria section with three filters: Territory (NorCal), Account Grade (A), and Date (2021-01-01 to 2021-01-31). Below this, the search results section shows 31 records found. A table displays the first five records, including Date, Territory, Company, Account Grade, Email, and Webpage.

	A	B	C	D	E	F
	Date	Territory	Company	Account Grade	Email	Webpage
1	2021-01-05T16:46:19Z	NorCal	CrowdStrike	A	kathryn.lodato@crowdstrike.com	www.openprisetech.com/sec
2	2021-01-05T16:48:33Z	NorCal	CrowdStrike	A	kathryn.lodato@crowdstrike.com	www.openprisetech.com/sec
3	2021-01-05T16:46:11Z	NorCal	CrowdStrike	A	kathryn.lodato@crowdstrike.com	www.openprisetech.com/sec
4	2021-01-08T21:18:13Z	NorCal	Okta	A	kat.nobles@okta.com	SubscriptionConfirm
5	2021-01-08T21:18:05Z	NorCal	Okta	A	kat.nobles@okta.com	SubscriptionCenter

### Challenge:

SDRs lack visibility into prospects' activity and engagement on the company website, so they aren't able to follow up in a timely manner.

### Solution:

App Factory helps SDRs identify accounts in their territory that have achieved a threshold score, and visited the company website in the last month. Now they can strike while the iron's hot.

### Business impact:

The SDR handling the Northern California territory identified more than two-dozen records with an "A" account grade in less than 30 seconds. Targeting highly qualified leads like this helps to boost opportunity creation.

A simple search shows all of the "A" grade accounts in the Northern California region who visited the company website during January of 2021.

# 4

# Account segmentation app



A chart of prospects in the lead database segmented by industry.

## Challenge:

A campaign manager needs to segment the prospect database for a new campaign.

## Solution:

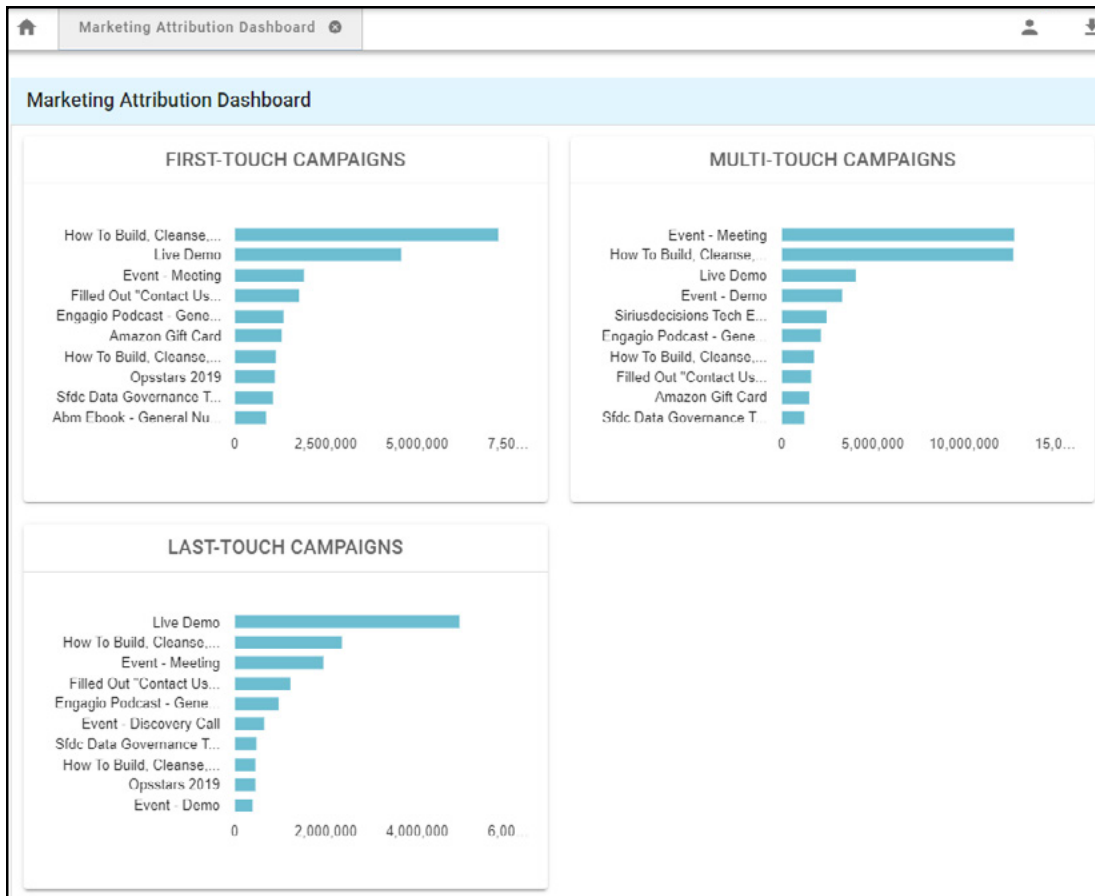
App Factory enables marketing and sales teams to easily target specific segments pulled from data from Salesforce, Marketo, and free trial campaigns.

## Business impact:

This campaign manager delivered a series of industry-specific email offers with the highest response rate in company history.

# 5

# Marketing attribution dashboard app



A chart of prospects in the lead database segmented by industry.

## Challenge:

A demand generation manager can't easily view marketing campaign performance.

## Solution:

App Factory dashboards make it easy to view campaign performance metrics to determine which ones are worth the investment.

## Business impact:

The dashboard showed that one campaign, "How to Build," performed so well that the demand gen manager expanded the campaign nationally, increasing the pipeline by more than 10%.

# 6

# ABM campaign list builder app

The screenshot displays the 'ABM Campaign List Builder' application. The 'Search Criteria' section shows two filters: 'Territory' set to 'Northeast' and 'Account Grade' set to 'A'. The 'Search Results' section indicates '1518 Records Found' and provides a 'Download' button. Below the results, a table lists columns: Account Name, First Name, Last Name, Territory, Title, Account Grade, Contact Grade, and Last Activity Date. The table contains five rows of data for 'Spartan' accounts in the 'Northeast' territory with 'A' account grades.

	A	B	C	D	E	F	G	H
	Account Name	First Name	Last Name	Territory	Title	Account Grade	Contact Grade	Last Activity Date
1	Spartan	Jessica	Hill	Northeast	SOPS Analyst	A	A	2021-01-27
2	Spartan	Ali	Backhouse	Northeast	Manager, Martech Systems	A	C	2019-11-21
3	Spartan	Mark	Hong	Northeast	Sales Operations Analyst	A	D	2021-02-18
4	Spartan	Tom	Chenault	Northeast	VP of Marketing	A	D	2021-02-16
5	Spartan	Bob	Wenderson	Northeast	Marketing Automation Specialist	A	A	2019-04-24

An easy search of "A" grade accounts within the Northeast territory.

## Challenge:

Sales can't easily identify high grade accounts without dedicated ABM software.

## Solution:

An ABM list builder app enables any account executive to pull a report of companies in their territory with a high account grade. So it's easy to send out a special holiday offer at the end of the quarter.

## Business impact:

A senior account executive quickly identified the strongest accounts in the Northeast region and closed a special end-of-year offer that closed dozens of additional deals, achieving quota and cementing strong quarter performance.

## 7

# Sales territory and routing rules app

Sales Territory & Routing Rules

Search Criteria

ADD FILTER GROUP

Territory Name matches Northeast

Search Results

1 Records Found

Download

Table Columns: Rule Type, Territory Name, Country, State Province, AE Email, SDR Email

	A	B	C	D	E	F
	Rule Type	Territory Name	Country	State Province	AE Email	SDR Email
1	State	Northeast	United States	New York Massachusetts New Hampshire Vermont Connecticut Maine Rhode Island Pennsylvania New Jersey	Rosie.Giola@openprisetech.com	jacob.velasco@openprisetech.com

Rows per page: 5 1-1 of 1

A fast search shows the existing AE and SDR owners of the Northeast territory. This info is a crucial jumping off point for restructuring routing logic.

## Challenge:

New salespeople have joined the company, resulting in a territory shuffle. The organization needs to update the lead routing rules to reflect these latest process changes.

## Solution:

Using App Factory, RevOps teams can build new lead routing rules and account assignments to reflect changes to sales team structure.

## Business impact:

Openprise made it easy to update routing rules and account assignments in minutes, sparing the RevOps team several days' work re-architecting the routing logic.

## 8

# Opportunities app

Opportunities

Search Criteria

ADD FILTER GROUP

Opportunity Stage matches Negotiation Proposal

Search Results

15 Records Found

Table Columns

Account Name Name Opportunity Stage Owner Email License Portion \$

	A	B	C	D	E
	Account Name	Name	Opportunity Stage	Owner Email	License Portion \$
1	Tektronix	Tektronix - Add Dynamics	Proposal	angelena.david@openprisetech.com	100,000
2	Flexential	Flexential + ZP +20	Proposal	zach.patterson@openprisetech.com	48,000
3	Commvault Systems Inc	Commvault Systems+Pro+DM	Proposal	rosie.gioia@openprisetech.com	103,752
4	Shorelight Education	Shorelight Education	Proposal	zach.patterson@openprisetech.com	60,000
5	Cohesity	Cohesity - Lead routing SFDC data	Proposal	angelena.david@openprisetech.com	15,000

Rows per page: 5 1-5 of 15

A quick and easy search of CRM information shows 15 late stage deals in the sales pipeline.

## Challenge:

A vice president of professional services doesn't have Salesforce access and has no visibility into late-stage deals and negotiations—leaving the team understaffed when new customers require large implementation efforts.

## Solution:

Using an app built in App Factory, it's easy to see late-stage deals in the sales pipeline so the professional services team can begin planning to staff new customer projects.

## Business impact:

With visibility into the late-stage pipeline, the professional services team can complete onboarding 32% faster, with 10% higher customer satisfaction and a 5% yearly increase in customer retention.

# 9

# Customer newsletter metrics app

Customer Newsletter Metrics

Search Criteria

ADD FILTER GROUP

Newsletter matches 20-12-16 - Customer Newsletter - December.Email

Search Results

1 Records Found

Download

Table Columns

Newsletter Activity Date Sent Delivered Opened Clicked Unsubscribed Soft Bounce Hard Bounce

	A	B	C	D	E	F	G	
	Newsletter	Activity Date	Sent	Delivered	Opened	Clicked	Unsubscribed	Sc
1	20-12-16 - Customer Newsletter - December.Email	2020-12-20T03:00:36Z	451	451	78	39	2	

Rows per page: 5 1-1 of 1

A report of relevant engagement metrics, like “sent,” “opened,” and “clicked,” from the latest company newsletter.

## Challenge:

Marketing managers don’t have access to analytics platforms and are missing out on key campaign insights.

## Solution:

App Factory enables marketing teams to see how customers interact with key content initiatives—giving them the visibility they need to make timely adjustments that boost engagement.

## Business impact:

The marketing manager discovered that newsletters with longer paragraphs received less engagement and more unsubscribes. After cutting the content in the next 3 newsletters, the metrics showed a 33% improvement in click through rate and a 45% reduction in unsubscribes.

# 10

# Customer 360 app

The screenshot displays the 'Customer 360' application interface. At the top, there is a 'Search Criteria' section with an 'ADD FILTER GROUP' button. Below this, two filter conditions are visible: 'Use Case - Lead Routing' with a dropdown set to 'has value', and 'Account - Primary Contact Name' also set to 'has value'. The 'Search Results' section below shows '14 Records Found' and a 'Download' button. A 'Table Columns' section lists: 'Account - Name', 'License - Type', 'Usage - No. of Jobs', 'Usage - No. of Users', 'Usage - No. of Records Total', and 'Account - Primary Contact Name'. The main table has columns A through F and contains 5 rows of data. At the bottom right, it shows 'Rows per page: 5' and '1-5 of 14'.

	A	B	C	D	E	F
	Account - Name	License - Type	Usage - No. of Jobs	Usage - No. of Users	Usage - No. of Records Total	Account - Primary Contact Name
1	ABC	Pro	251	9	4,136,529	John Smith
2	DEF	Enterprise	187	8	13,637,584	Jane Doe
3	GHI	Pro	74	9	10,263,204	Bob Brown
4	JKL	Pro	169	13	158,675,912	Michael Wilson
5	MNO	Pro	123	6	11,112,179	Emily White

A quick and easy search of all professional services contacts associated with the customer account.

## Challenge:

A PR manager wants to identify happy customers using a specific piece of functionality for a PR campaign, but they don't have a Salesforce license.

## Solution:

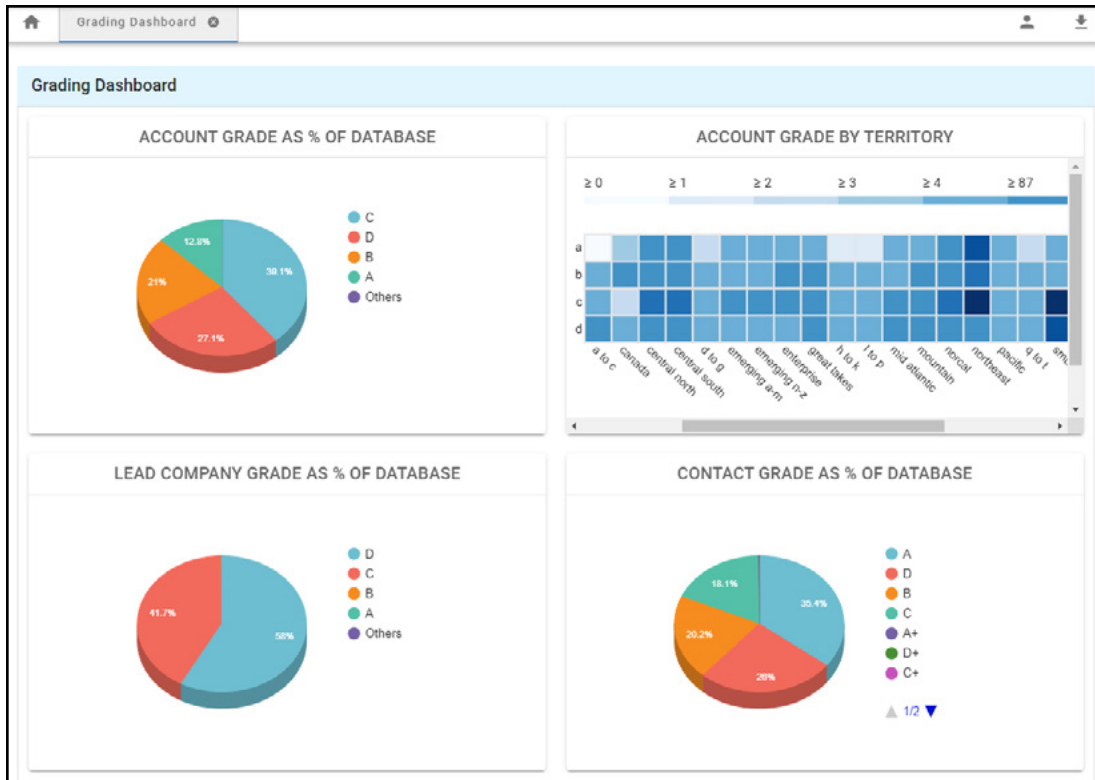
An app built in App Factory gives the PR manager a 360-degree view of every customer—including those with a high NPS score using a given capability. The PR manager can also see account managers for the customers that fit the requirements.

## Business impact:

The campaign launched in half the time it typically takes, and identified five new customer advocates to work with in other campaigns, as well as interest from 10 new prospects.

# 11

# Grading dashboard app



A graph of account grades, from A – D, broken down by territory.

## Challenge:

A digital marketing director wants to quickly target the top accounts in each region.

## Solution:

App Factory enables marketing teams to view the breakdown of account grades for each territory to see which regions have the highest concentration of companies in the Ideal Customer Profile.

## Business impact:

The digital marketing director increased paid advertising spend in the Northeast after identifying it as a geography with strong buying power. Since then, these leads have converted into opportunities at a 61% higher rate than average.

# 12

# Campaign performance app

Campaign Performance

Search Criteria

ADD FILTER GROUP

Name matches ABM eBook

AND Grade A Accounts has value

Search Results

2 Records Found

Table Columns

Name End Date Members Net New Leads Grade A Accounts Grade B Accounts Opportunities Opportunities Won First-Touch Opp Count

First-Touch Opp Count Multi-Touch Opp Count Multi-Touch Opp Count

	A	B	C	D	E	F	G	H
	Name	End Date	Members	Net New Leads	Grade A Accounts	Grade B Accounts	Opportunities	Opportunities Won
1	ABM eBook		224	11	21	11	2	0
2	ABM eBook		233	10	22	15	2	0

Rows per page: 5 1-2 of 2

Detailed breakdown of the “ABM eBook” campaign’s performance, with dozens of metrics that can be added or subtracted from the report.

## Challenge:

A digital marketing director would like to better understand the performance of a recent campaign.

## Solution:

An app built in App Factory makes it easy to ascertain that 90% of responses were from prospects that meet the company’s Ideal Customer Profile.

## Business impact:

By replicating that campaign on a larger scale, the digital marketing director generated 30% more pipeline this quarter than last.

# Final thoughts

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These are just a sample of the applications that Openprise and our customers have built. If you'd like to learn more about using App Factory, drop a line to [support@openprisetech.com](mailto:support@openprisetech.com) or call 1-888-810-7774.

No matter who your users are or what kind of data they need, App Factory can help you deliver.



# About Openprise

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The Openprise RevOps Automation Platform fuels company growth by automating hundreds of sales and marketing processes, helping RevOps teams realize the value promised from their RevTech investments. Openprise is a single, no-code platform that can help to simplify even the most complex RevTech stack. For more information, please visit [www.openprisetech.com](http://www.openprisetech.com).



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