

Driving the Sales Engine with Comprehensive Knowledge of Customers

Aprimo Leverages Account Transparency to Bolster Account Management



Aprimo offers a suite of marketing automation products to help marketers govern and grow their brand. Their marketing operation hub includes marketing automation, asset management, campaign management, governance and more. Aprimo's enterprise customers invest in varied combinations of the technology hub.

While each module of the hub provides visibility into customer usage, their Customer Success Directors did not have a unified view of usage, support, and health of each account within their portfolio. **Adopting Bolstra has provided the team with a single dashboard for each customer with a universal display of account data. This kind of transparency into accounts has given the team clear insights which enable them to better leverage opportunities for growth and improvement of processes.**

The Problem

Without a comprehensive view of customer usage across a suite of technology modules, it's difficult to fully know customers and realize opportunities for account enhancements.

Aprimo Customer Success is chartered with not only managing the engagement of customers, but also making sure that they are deriving optimal value from the technology. This can be difficult to know, and act on, without having a single view into account data, such as usage, support, finances, etc.

Adam Staples leads the Customer Success team at Aprimo. With a mind for process improvement, Adam recognized the challenges that the team had in managing their portfolio of customers.



“Our Customer Success Directors each manage 10 - 12 enterprise accounts, who each use a different combination of our technologies. While our system provides usage data, we did not have a unified dashboard that the team could access to know clearly how our customers are engaging and where they may need more from us.”

— ADAM STAPLES, APRIMO CUSTOMER SUCCESS DIRECTOR

The Solution

By adopting Bolstra, Aprimo has consolidated account data into a single dashboard, giving their Customer Success team a more complete picture of their customers.

Aprimo has big plans for adopting Bolstra. Customer Success Directors are the first users. These users are gaining back time in their day by not having to hunt down and aggregate customer usage and support data. They use this time to develop meaningful plans for helping their customers more fully adopt their solutions. They also use this data to identify patterns of usage and support across accounts that should be addressed operationally or through product enhancements. This could not be done easily without the dashboard Bolstra provides.

“Bolstra provides us with a fulcrum of sorts to leverage data. The more consolidated knowledge we have of our customers, the better we are able to serve them, identify growth opportunities, and improve our own processes.”

— STAPLES

The Value

A comprehensive view of customer data is the leverage that account managers need to be able to maximize the value of accounts.

The Aprimo Customer Success team is tasked with ensuring customer success, securing renewals, and identifying expansion opportunities. Having a single view of each of their portfolio accounts, CSDs are able to identify patterns and gaps, which help them better service their accounts.



“The dashboards we now have in Bolstra serve as actionable leverages for our account management team. They provide universal usage data that our team is able to assess and use in helping customers grow in adoption.”

— JOHN STAMMEN, APRIMO CEO

The usage data that Aprimo now has easy access to is just the first step in Aprimo’s Bolstra adoption. In the near future, Aprimo will be moving more functions to Bolstra, including assignment of accounts (that was previously done in SFDC), management of contract renewals, automation of reviews, and more.

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