

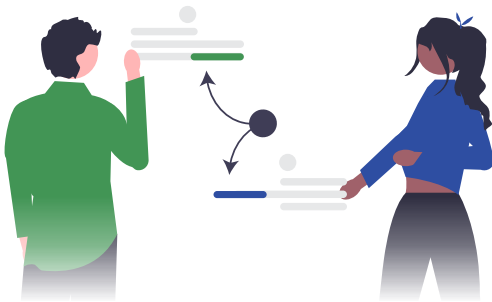
Case Study

How LLR Partners Uses Insentric to Align Marketing Strategy with Business Outcomes

OVERVIEW

LLR Partners, a private equity firm, operates in a competitive space where firms largely offer the same product: capital and value added partnership. LLR relies on a data-driven marketing and content strategy focused on brand differentiation, industry expertise, and cultivating meaningful relationships with founders and CEOs of growing businesses to differentiate itself from other firms.

As part of this strategy, LLR deployed the Insentric Marketing Attribution Platform to unify marketing and sales data, improve campaign performance visibility, and demonstrate marketing's influence on business outcomes.



CHALLENGE: Turning Disparate Data into a Unified Marketing Story

LLR's marketing team faced three key challenges:

- 1 Siloed Data Across Systems**
Prospect and sentiment data lived in multiple platforms like Salesforce, Marketo, Google Analytics, and Tableau, making it time-consuming to generate unified insights or consistent reports.
- 2 Non-linear Customer Lifecycle**
Long deal cycles spanning months or even years and being heavily relationship-driven made it difficult to attribute marketing activities to pipeline movement or outcomes directly and also important for brand visibility in every step of the journey.
- 3 Measuring Both Quantitative and Qualitative Impact**
LLR needed to track both hard metrics (downloads, site visits, email engagement) and soft signals (internal feedback, CEO mentions, direct responses) to understand marketing's real impact.



With Insentric, we've cut down on time spent wrangling data from multiple platforms. By bringing together insights from Marketo and Salesforce, we can clearly see how our engagement metrics connect to pipeline activity. It's given us real precision in shaping content strategy and deciding where to invest in campaigns. Plus, we're now able to dig into individual user journeys and understand how marketing interactions align with CRM stages.



Emily Oakes
Strategic Marketing
LLR Partners

SOLUTION: Integrating Insentric for Unified Attribution and Insight

LLR implemented Insentric to integrate and streamline their reporting stack. Insentric connected data from Marketo and Salesforce, eliminating the manual effort of stitching together data from various platforms and enabling deeper analysis into marketing effectiveness.

This allowed the Marketing team to:

- Map content and campaigns to each buyer journey stage using CRM integrations.
- Track how marketing interactions influenced pipeline progression.
- Measure the performance of high-touch campaigns and content across multiple channels.
- Present clear, actionable insights to internal stakeholders.

KEY REPORTS & INSIGHTS POWERED BY INSENTRIC



1

Marketing Influence on Pipeline Progression

LLR used Insentric to track how marketing interactions impacted later-stage opportunities. One report showed that 33% of “On Track” pipeline opportunities had recent marketing touches, compared to only 22% of “Off Track” opportunities, demonstrating an 11% lift in opportunity momentum when marketing was involved.

2

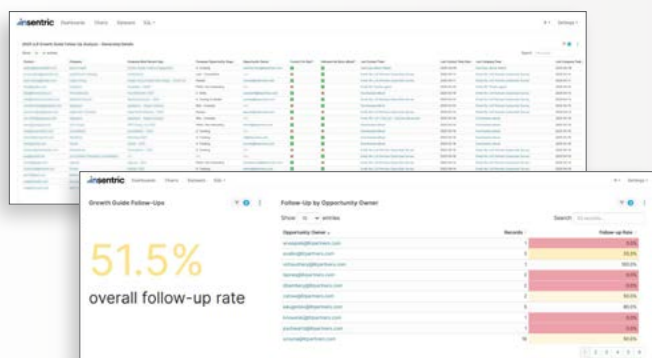
Growth Guide Campaign: Source and Medium Attribution

The team runs an annual campaign called the Growth Guide eBook, promoted via Marketo emails, social media, personalized sales outreach, and physical mailers. Insentric’s native integration with Marketo forms enabled precise tracking of which channels assisted with conversions, helping the team optimize future campaign investment by channel.

3

Campaign Engagement by Lifecycle Stage

A campaign engagement report tracked how leads engaged with the Growth Guide by lifecycle stage. This helped LLR align sales outreach timing with marketing engagement, ensuring timely follow-ups and maximizing the value of each lead’s interaction with campaign content.



RESULTS: From Manual Reporting to Strategic Decision-Making

Since adopting Insentric, LLR has:

- Reduced reporting time by eliminating manual data pulls across platforms.
- Increased confidence in data accuracy, allowing for quicker and more strategic content and campaign decisions.
- Better aligned marketing with sales, by mapping activity and engagement to lifecycle stages in the CRM.
- Quantified marketing's role in business outcomes, improving internal visibility and demonstrating marketing's true influence on pipeline development.

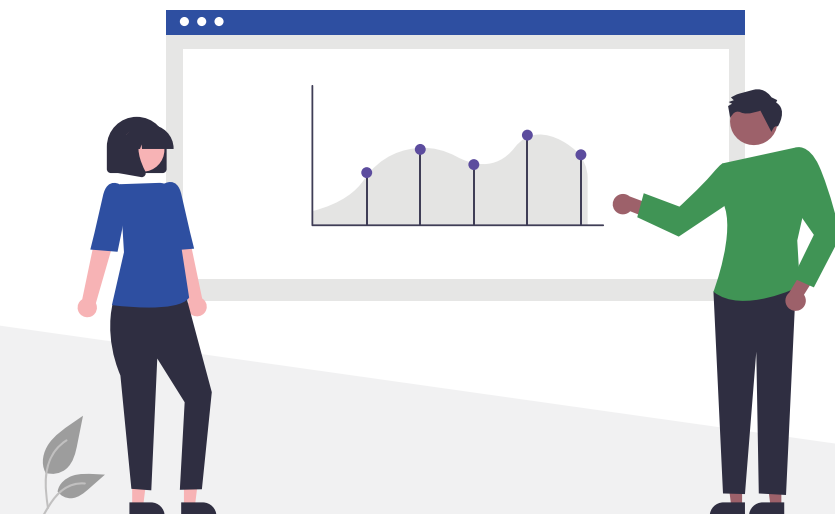
ADVICE FOR OTHER MARKETING LEADERS

Based on their experience, the LLR team shares several tips for other marketing leaders navigating similar challenges:

- Start with strategy and questions. Define what you're trying to solve before you build dashboards or buy tools.
- Balance influence and attribution. Not all impact is easily measurable. Listen to anecdotal signals from your team and the market.
- Start small. If data is scattered, focus on understanding 2-3 core reports from each system and build your story from there.
- Let internal feedback guide evolution. Encourage teams to share feedback and signals of influence that help round out the data.

CONCLUSION

Insentric has become a crucial part of LLR Partners' marketing tech stack, enabling the firm to make informed, data-backed decisions about content strategy, campaign investments, and resource allocation. By connecting the dots between marketing engagement and business outcomes, LLR continues to position itself as a thoughtful, expert partner to high-growth businesses.



Ready to get started? Get a demo today.

